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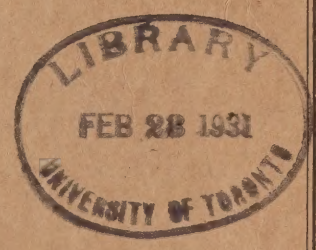
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Greece as a Market

By HENRI TURCOT

Canadian Government Trade Commissioner in Greece

Price 25 cents



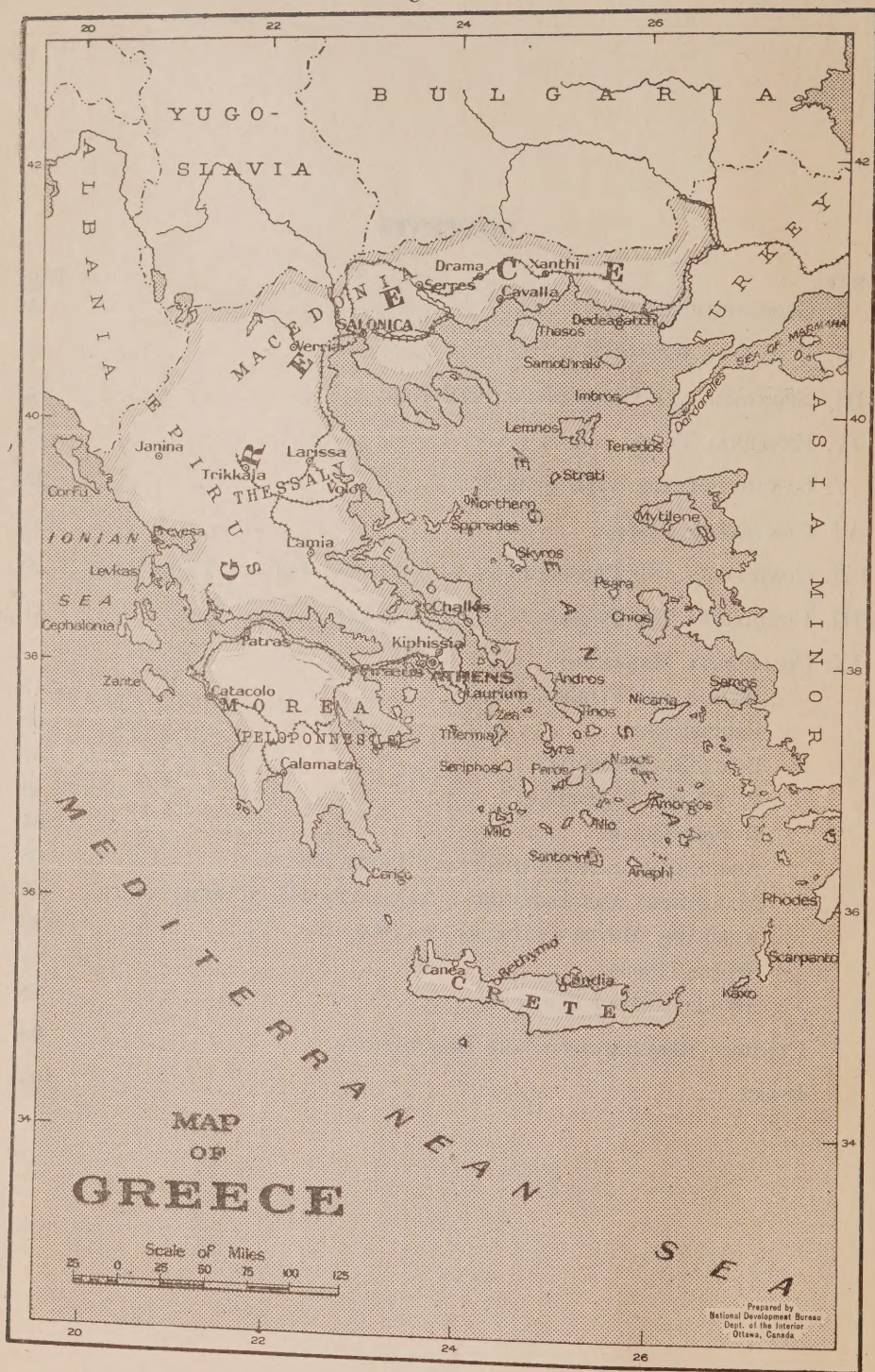
DEPARTMENT OF TRADE AND COMMERCE
OTTAWA, CANADA

Hon. H. H. STEVENS, Minister F. C. T. O'HARA, Deputy Minister

COMMERCIAL INTELLIGENCE SERVICE
C. H. PAYNE, Director

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GREECE AS A MARKET

[1 drachma = 1·3 cents Canadian (approximately 76 paper drachmae = \$1 Canadian); 1 metre = 39·37 inches; 1 kilometre = 1,093·633 yards; 1 hectare = 2·4711 acres; 1 square metre = 10·76 square feet; 1 kilogram = 2·2046 pounds; 1 metric quintal = 220·46 pounds; 1 metric ton = 2,204·6 pounds; 1 litre = 1·76 imperial pints.]

I

Geographical Data

AREA

ATHENS, July 30, 1930.—Under the domination of Turkey since 1453, Greece obtained her independence by force of arms in the earlier part of the nineteenth century, and was declared a kingdom in 1830. The Kingdom of the Hellenes then comprised the Peloponnesus, a portion of the Greek peninsula proper, and a certain number of the Aegean islands such as the Cyclades and the Northern Sporades, to which were subsequently added the Ionian islands (1864) and the plain of Thessaly (1881), all these parts, which extended over an area of 63,211 square kilometres (24,405 square miles), constituting Old Greece. After the Balkan wars, other territories known as New Greece were annexed to the country; they consisted of Macedonia, Epirus, Crete, and some islands in the Aegean, the principal of which are Chios, Mitylene and Samos. Subsequent to the World War, Thrace and a portion of the vilayet of Aidin in Asia Minor were occupied by Greece, who was confirmed in these occupations by the treaties of Neuilly and Sèvres, but as a result of the Greek military disaster in Asia Minor (1922), Smyrna and Eastern Thrace had to be evacuated, and in virtue of the treaty of Lausanne the islands of Imbros and Tenedos had to be ceded to Turkey, with the result that Greece's total area now stands at 130,199 square kilometres (50,270 square miles). The Greek Republic is bounded on the east by Turkey, the Sea of Marmora, the Strait of Dardanelles and the Aegean sea; on the south, by the Mediterranean, on the west, by the Ionian sea, and on the north, by Albania, Jugoslavia and Bulgaria. Since March 25, 1924, Greece, the capital of which is Athens, has been a Republic.

POPULATION

According to the figures of the census taken in 1907, the population of Old Greece was estimated at 2,631,952 inhabitants, whilst the 1913 census gave a population of 2,101,014 for New Greece, and that of 1920 placed the total population of Greater Greece at 5,016,889 inhabitants. Finally, the 1928 census indicated a population of 6,204,684 inhabitants for the whole of Greece, or slightly over 123 inhabitants per square mile, this increment as compared with 1920 being largely due to the exchange of Turks and Greeks. It might at this point prove of interest to note that in 1830 Greece's population numbered only about 750,000 inhabitants.

By professions and trades, the Greek population of ten years of age and over (numbering 4,814,720) was in 1928 detailed as follows:—agriculture, 1,293,398; cattle raising, 167,302; fishing, 14,941; mining, 9,340; industry, 429,831; shipping, 106,758; credit and exchange, 22,937; commerce, 185,560; personal services, 57,570; liberal professions, 85,969; public services, 44,472; without profession, 2,066,212; not having declared a profession, 330,430.

With the exception of 120,000 Jews, practically all of whom live in Salonica, and some 20,000 Roman Catholics who are scattered in the larger towns and in the islands, all Greeks belong to the Orthodox faith.

PHYSICAL FEATURES

Greece is essentially a mountainous country. The valleys, plains and plateaus are generally rich and fertile, but with the exception of the plain of Thessaly present no real importance. Only 22 per cent of Greece's total area is under cultivation, whilst the remainder is shared by pasturage, forests, swamps, lakes, and barren rocks. Two notable features about the configuration of the country are its extended coastline, which is proportionally twice as long as that of France, and the fact that no point in Greece, except for some few regions in Thessaly, is more than fifty miles distant from the sea.

CLIMATE

The climate of Greece is typically Mediterranean. The mean temperature for the whole of the country ranges from 45 to 50° F. in January and from 75 to 85° F. in July, whilst in Athens, which is reported as being the hottest of the towns situated under the same latitude (38), as high a temperature as 105° F. in the shade is not infrequently reached during the summer months. Rain-falls averaging eighteen inches annually occur mainly in late autumn and winter, while except in the northern parts snow is to be found only on the highest peaks. Clear air, general absence of fogs and mists, together with extremely rare frosts, are other characteristics of the climate of Greece.

II

Economic Wealth

AGRICULTURE

Area under Cultivation and Crops.—Out of a total area of 13,019,900 hectares, only 3,090,148·8 hectares, or approximately 22 per cent, were under cultivation in 1928. However, agricultural production represents in round figures 90 per cent of Greece's total production and 70 per cent of her exports. The principal crops grown in Greece are cereals, tobacco, vegetables, olives, cotton, fodder plants, currants, sultanas, grapes, fruit, almonds, and mulberry trees for the silkworm; the agricultural regions are Macedonia, Thrace, Thessaly, Epirus and the Peloponnesus, the three first-named being the most important. Details regarding the agricultural products harvested in this country, the area on which each of these are grown, their quantity and value, for 1928—the latest figures available—are to be found hereafter in table form:—

Product	Area		Quantity		Value	
	In Hectares		In Metric Quintals		In Paper Drachmae	
	1928	1927	1928	1927	1928	1927
Wheat	538,040.3	498,897.6	3,561,296	3,529,942	1,930,674,330	1,933,863,676
Barley	201,943.6	188,368.9	1,577,668	1,583,088	561,524,391	544,345,081
Meslin	48,187.7	48,156.5	229,951	271,279	119,169,846	135,272,464
Corn	183,419.8	197,052.0	1,288,436	1,298,038	503,742,860	491,702,607
Oats	112,138.7	103,161.1	761,465	674,929	253,686,362	224,822,764
Rye	55,264.7	47,228.5	439,609	382,309	166,272,311	146,425,946
Potatoes	10,616.4	10,858.8	330,883	331,650	95,574,298	93,709,438
Beans, peas, lentils and other vegetables.. . . .	67,693.7	70,010.9	1,072,678	994,031	313,436,649	271,278,354
Tobacco	93,076.5	92,314.6	587,376	632,165	2,143,891,787	2,343,222,274
Cotton	15,404.0	14,581.1	107,506	90,852	115,998,855	99,616,431
Sesame, aniseed and other industrial and aromatic plants.. . . .	16,242.3	17,622.3	47,110	42,542	54,520,853	47,815,083

Product	Area In Hectares		Quantity In Metric Quintals		Value In Paper Drachmae	
	1928	1927	1928	1927	1928	1927
Hay	40,403.8	42,228.0	1,072,069	1,034,643	153,035,279	145,785,126
Trefoil	10,389.8	11,016.1	395,318	399,262	59,126,086	67,592,313
Grapes	131,665.1	114,399.8	3,425,546	2,604,643	1,007,524,028	836,609,847
Currants	61,795.3	61,481.9	1,594,508	1,634,245	1,272,844,475	1,151,918,124
Sultanas	3,867.1	2,704.9	112,394	64,573	103,901,280	65,314,885
Olives	1,500,000.01	1,500,000.01	1,491,205	872,290	2,413,233,197	1,683,029,732
Apples, figs and almonds ..	.....	.....	776,541	690,174	236,444,561	237,671,287
Lemons, oranges, citrons, mandarins (units). .. .	.....	.....	185,389,000	187,421,000	91,722,811	68,331,998
Total	3,090,148.8	3,020,083.0	18,971,559	17,130,655	11,596,324,259	10,588,327,430

¹ For olive and fruit trees.

Exports of Agricultural Products.—Greece's principal exports of agricultural products are, in order of decreasing importance, tobacco in leaves, currants, wine, olive oil, olives, dried figs, grapes, and cigarettes. These exports for 1929 and 1928 respectively amounted to 300,345 and 287,730 metric tons and were estimated at 5,949,986,997 and 5,023,025,503 paper drachmae, tobacco in leaves taking as its share about three-fifths of these returns, whilst currants and wine are also shipped to foreign countries in appreciable quantities. Tobacco, currants and wine form the staples of exportation.

Imports of Agricultural Products.—Wheat represents a considerable item in Greece's imports of agricultural products. In fact, 597,909 and 475,992 metric tons valued respectively at 2,694,922,847 and 2,285,725,779 paper drachmae were imported into this country in 1929 and 1928. Other imports of agricultural products, which, although of much lesser importance, are of interest to Canadian exporters, comprise potatoes, fresh apples, barley and oats.

Progress in Agriculture.—Agriculture in Greece has shown progress during the past few years, thanks to the establishment of a large number of refugees on the land, and to the Government who spare no efforts to increase agricultural production, their firm desire being eventually to render the country self-supporting in agricultural produce, especially wheat. Amongst the measures adopted by the Government in their agricultural campaign were the following: The establishment of a credit institution (Agricultural Bank), with branches throughout the country, the special purpose of which is to advance loans to farmers at low interest on their purchases of seeds, machinery, etc.; the reclamation of vast areas of land—300,000 hectares are now being reclaimed in Macedonia and Thrace; irrigation works, which are being extended to wider areas; the building of a network of arterial roads to facilitate internal transport; the granting of customs facilities on the import of agricultural machinery and implements; a reduction of export dues on agricultural produce; the formation of more than four thousand agricultural associations throughout the country; the organization of experimental agricultural colleges; the giving of technical instruction to the peasant farmers; and finally, the establishment of a colonization department for the purpose of assisting refugees in opening up new areas of arable land. These various measures have already resulted in an increase in the area under cultivation, an improvement in methods of culture, and an increment in production. The Government's endeavours promise well for the future, but it is evident that several years must elapse before the country can produce in sufficient quantities to meet the requirements of the nation.

Prospects for Modern Agricultural Implements.—There is at present in Greece a pronounced tendency towards the employment of modern agricultural machinery and plant, and as agricultural development progresses, the market for modern machinery will become gradually wider. It is, in fact, estimated

that the next few years will see the introduction of large quantities of such machinery and plant.

LIVESTOCK

The livestock in Greece, including approximately 7,000,000 sheep and 5,000,000 goats, etc., is estimated 13,500,000 head. Annual exports of animal products such as wool, hides and skins amount in round figures to \$2,000,000, whilst imports are valued at \$2,500,000.

MINING

Exploitation and Principal Minerals Extracted.—Greece is rich in minerals, but methods of exploitation are as yet altogether primitive and extracting operations comparatively limited. The number of men engaged in mining is 9,340. The principal minerals extracted comprise iron and zinc ores, lead, chrome iron ore, iron pyrites, magnesite, emery, nickel and lignite. Calcined magnesite, calcined calamine, pig lead and arsenic acid represent the most important furnace products, whilst the main quarry products are marbles, gypsum, millstones and Santorin earth. The well-known emery deposits of Naxos, the puzzolan of Santorin, the gyps and millstones of Milo, and all the salt deposits and salines, from which a part of the proceeds are assigned to the revenues of the International Financial Commission of Greece, are state-controlled industries. Lauriu, where some mines have been worked from the time of the Ancient Greeks, is the most important mining centre in this country.

Mineral Production.—The production of the mining industry for 1928 and 1927 was as follows:—

Product	1928 Metric tons	1927 Metric tons
Iron.. . . .	166,868	123,865
Ferro-manganese.. . . .	37	623
Lead.. . . .	70,689	89,893
Zinc.. . . .	17,671	30,597
Managanese.. . . .	1,080	8,083
Nickel.. . . .	10,800	500
Sulphurous mixtures.. . . .	9,496	.....
Chrome ore.. . . .	20,953	17,314
Magnesite.. . . .	104,421	84,484
Lignite.. . . .	120,639	143,346
Emery.. . . .	13,129	15,848
Iron pyrites.. . . .	94,270	100,050
Steatite.. . . .	30	213
Sulphur ore.. . . .	304	2,432
Bauxite.. . . .	300	4,300
Bitumen.. . . .	3,173	290
Copper.. . . .	20	.....
Pig lead.. . . .	7,306	5,325
Calcined calamine.. . . .	6,138	11,916
Arsenic acid.. . . .	709	1,036
Arsenic residue.. . . .	5,348	7,947
Calcined magnesite.. . . .	26,201	27,433
Magnesite, dead burnt.. . . .	130	1,365
Gypsum.. . . .	.....	3,864
Sulphur.. . . .	25	249
Asphalt.. . . .	1,700	.....
Mixed acids.. . . .	1,880	.....
Santorin earth.. . . .	120,692	44,780
Marbles (cubic metres).. . . .	1,700	.....
Millstones (units).. . . .	5,330	4,472

Minerals Sold.—During the corresponding period, the following quantities of minerals proper and furnace and quarry products were sold, sulphur, lignite and a certain quantity of iron pyrites being disposed of locally, the remainder being exported abroad:—

Product	1928 Metric tons	1927 Metric tons
Iron.. . . .	271,714	166,191
Ferro-manganese.. . . .	.....	.....
Lead.. . . .	2,855	2,418
Zinc.. . . .	1,850	3,155
Manganese.. . . .	1,336	11,330
Nickel.. . . .	.....	500
Sulphurous mixtures.. . . .	20,810	.....
Chrome ore.. . . .	18,911	16,844
Magnesite.. . . .	22,120	19,733
Lignite.. . . .	122,942	137,586
Emery.. . . .	15,883	14,931
Iron pyrites.. . . .	91,554	100,760
Steatite.. . . .	181	221
Sulphur ore.. . . .	.....	210
Bauxite.. . . .	.....	4,080
Pig lead.. . . .	7,097	5,283
Calcined calamine.. . . .	8,306	11,858
Arsenic acid.. . . .	769	1,006
Calcined magnesite.. . . .	27,012	25,850
Magnesite, dead burnt.. . . .	276	1,243
Gypsum.. . . .	1,625	3,838
Sulphur.. . . .	.....	251
Asphalt.. . . .	1,600	2,408
Santorin earth.. . . .	120,692	44,780
Marbles (cubic metres).. . . .	1,653.56	1,865.69
Millstones (units).. . . .	5,330	4,472

Imports.—It should, however, be noted that Greece annually imports approximately 800,000 tons of coal and 60,000 tons of gasoline and kerosene, as well as appreciable quantities of pig iron, pig lead, white metal in bars, copper in sheets and tubes, brass ingots, soldering, steel in various shapes and sizes, together with iron rods, steel and iron girders, rails, black steel sheets, galvanized sheets, cast iron pipes for gas and water supplies, zinc sheets, brass sheets for household utensils, aluminum in sheets and moulding, lead pipes, etc.

Prospects for Modern Machinery and Plant.—Progress has been observed in the Greek mining industry during the past few years, and it is expected that further developments will take place, these developments entailing the use of modern machinery and plant. Canadian manufacturers of mining tools and machinery would be well advised to keep au courant of the coming changes in order that they may take advantage, if possible, of any future openings for these commodities.

FISHING

Importance of Industry.—Greece has a very long coast-line, and fishing of all kinds is being carried on, but in a more or less haphazard manner. It will be observed that 14,941 persons were in 1928 engaged in this industry. The annual catch is estimated at over 45,000,000 pounds. The catch consists principally of mackerel, tunney, gudgeon, mullet, smelt and sardines. Besides sea-fishing, there is a certain amount of fishing being done in lakes and rivers. Practically all local fish is sold fresh. No canning is being conducted in the country.

Imports of Fish.—In spite of the comparatively large quantities of fish caught locally, imports of fish are quite considerable, as the Greek people, owing to climatic conditions, consume but little meat. Imports comprise tinned salmon, mackerel, sardines, lobsters, crabs; dried codfish; salted herrings; and

sardines in brine. Canadian exporters at one time were securing a reasonable share of the salmon trade, but owing to the Dominion's product being dutiable under the maximum rates, this business has been almost entirely lost to Japan and the United States. Canadian tinned lobsters, on account of their being too expensive for the ordinary clientèle, find in this market only a limited opening. It would appear that Canadian dried codfish cannot compete with the Labrador and French product. For other kinds of fish, the absence of a trade agreement with Greece renders competition difficult. Price is the determining factor in this market, quality being as a rule only of secondary importance.

FORESTS

State of Forests.—The timbered districts in Greece, amounting to 12 per cent of the country's total area, are to be found mainly in the northern provinces, and especially in Western Macedonia. Walnut, beech, oak, spruce, chestnut and pine are the principal species. Owing to a complete lack of reforestation and control, the forests have not been properly developed, nor have they been properly exploited on account of the absence of transport facilities. In the past it has been the custom of roaming shepherds, peasants, etc., to cut down trees at will or to allow their flocks to graze without restriction. The Ministry has now taken the matter in hand. Reforestation is to be started, and unauthorized cutting down of trees as well as indiscriminate grazing of flocks are to be punished. Until such time as proper control is exercised, reforestation is systematically adopted and put into practice, and roads are built, the exploitation of forests will be hindered, the local sawmill industry will remain undeveloped, and Greece will be largely dependent upon foreign markets for timber, as is the case at present.

Sawmill Industry.—A sawmill industry in the real sense of the word does not exist in Greece. There are but a few small mills, equipped with primitive machinery and dependent mainly on manual labour, of which the output is limited and sold locally to farmers and peasants for the building of barns, huts, fences, etc. The only comparatively important sawmill in Greece is attached to a woodworking plant, and has a capacity of 50 cubic metres per day. Its machinery, partly French and partly British, consists of an automatic carriage hand-saw and two gang-saws. It must, however, be added that the Greek industry of box shooks and staves is quite flourishing. Beech is used in this industry.

Revenue from Forests.—The annual revenue derived from Greek forests, firewood being included, amounts in round figures to 400,000,000 drachmae.

Imports.—Imports consist principally of white timber (70 per cent), oak, pitchpine, etc., are valued at about 645,000,000 paper drachmae per year and come mainly from Yugoslavia, Roumania and Sweden, with small quantities originating in the United States, Turkey, Czechoslovakia, Italy, Germany, Austria and France. Box shooks and staves are all manufactured locally, owing to this industry being highly protected, but a large share of the timber utilized in the making of these commodities is bought abroad.

MANUFACTURING INDUSTRIES

Progress in Manufacturing Industries.—Since 1920 a comparatively great impetus has been given to Greek industry. In fact, from a number of 2,905 in 1920, employing 36,214 workmen, industrial enterprises passed to 3,903, with 70,000 men and women, in 1929. In other words, the number of industrial plants in 1929 as compared with 1920 revealed an increase of 998, whilst the number of workmen showed an increase of 33,786. On the other hand, in 1920,

there were 145,000 small craftsmen making various articles as against 359,831 in 1929, the increase being consequently 214,831. Greek industrial plants were distributed in 1929 as follows: metallurgical, 5; mechanical, 180; building material, 202; textile, 222; alimentary, 1,835; chemical, 244; tanning, 470; printing and paper, 165; clothing, 31; lumber, 304; cigarette, 75; and electric, 170. Greek industrial establishments are being operated by steam, kerosene, electricity, gas or water-power, with some also employing no motor force whatsoever.

Industrial Production.—Industrial production was valued in 1929 at 9,805,895,700 paper drachmac as compared with 11,405,172,500 paper drachmac in the previous year, this diminution in value being due to a general fall in prices and not to a decline in the volume of production. Details regarding the industrial production of Greece in 1929 and 1928 are given hereafter in table form:—

Kind	Value In Paper Drachmac	
	1929	1928
Metallurgical.. . . .	58,070,000	68,700,000
Mechanical.. . . .	273,875,000	264,610,000
Building material.. . . .	403,481,500	381,900,000
Textile.. . . .	1,865,700,000	1,779,000,000
Alimentary.. . . .	4,131,629,100	5,717,123,000
Chemical.. . . .	1,053,090,100	985,716,900
Tanning.. . . .	695,000,000	975,000,600
Printing and paper.. . . .	211,000,000	171,500,000
Clothing.. . . .	61,850,000	98,200,000
Lumber.. . . .	347,500,000	335,500,000
Cigarette.. . . .	214,700,000	207,922,000
Electric.. . . .	490,000,000	420,000,000
Total.. . . .	9,805,895,700	11,405,172,500

Small craftsmen are engaged principally in making carpets, furniture, boots and shoes, wooden articles, bibelots, etc.

Greek Manufactures.—The commodities manufactured in Greece, including flour, wine, and olive oil, are the following:—

Commodity	Quantity	1929	1928
Argentiferous lead.. . . .	..kg.	5,330,000	7,306,470
Arsenic acid.. . . .	..kg.	725,000	768,850
Nails.. . . .	..kg.	5,000,000	6,500,000
Screws.. . . .	..kg.	150,000	150,000
Scales.. . . .	..units	1,500	1,800
Safes.. . . .	..units	350	500
Bedsteads.. . . .	..units	70,080	60,000
Agricultural implements and ploughs.. . . .	..units	25,000	30,000
Bridles.. . . .	..units	300,000	250,000
Locks.. . . .	..dozens	25,000	50,000
Storage batteries.. . . .	..units	2,000	850
Copper and brass articles.. . . .	..kg.	1,300,000	1,300,000
Aluminum household utensils.. . . .	..kg.	27,000	16,000
Enamelled household utensils.. . . .	..kg.	150,000	.....
Lead pipes.. . . .	..kg.	500,000	500,000
Cement.. . . .	..kg.	155,000,000	145,000,000
Bricks and tiles.. . . .	..units	170,000,000	165,000,000
Pozzolana bricks.. . . .	..units	12,200,000	7,280,000
Tiles.. . . .	..units	35,000,000	33,000,000
Mosaic bricks.. . . .	..sq. m.	600,000	600,000
Lime.. . . .	..quintals	3,500,000	3,500,000
Cotton yarn.. . . .	..kg.	8,190,000	7,920,000
Cotton goods.. . . .	..piques	30,000,000	25,000,000
Thread on reels.. . . .	..dozens	20,000	50,000
Woollen yarn for the manufacture of carpets.. . . .	..kg.	300,000	260,000
Woollen yarn.. . . .	..kg.	200,000	.....
Woollen textiles.. . . .	..metres	3,400,000	4,000,000

¹ Including flour, olive oil and wine.

DEPARTMENT OF TRADE AND COMMERCE, CANADA

Commodity	Quantity	1929	1928
Carpets.. . . . .	..sq. m.	160,000	200,000
Raw silk.. . . . .	..kg.	175,000	175,000
Silk goods.. . . . .	..piques	2,200,000	1,800,000
Artificial silk.. . . . .	..kg.	45,000	.....
Bags.. . . . .	..units	1,000,000	1,500,000
Cordage and twine.. . . . .	..kg.	2,500,000	2,500,000
Oils.. . . . .	..kg.	75,414,300	100,071,000
Wine.. . . . .	..kg.	213,000,000	307,523,200
Alcohol, pure.. . . . .	..kg.	123,000	.....
Alcohol, denaturalized.. . . . .	..kg.	6,700,000	6,450,000
Spirits.. . . . .	..kg.	16,300,000	17,050,000
Ice.. . . . .	..kg.	100,000,000	87,500,000
Beer.. . . . .	..kg.	10,320,270	8,420,000
Cottonseed oil.. . . . .	..kg.	1,500,000	1,200,000
Coconut and palm oil.. . . . .	..kg.	750,000	1,000,000
"Tournesol" oil.. . . . .	..kg.	200,000	65,000
Soya bean oil.. . . . .	..kg.	.....	80,000
Cotton seed oil-cake.. . . . .	..kg.	15,000,000	13,000,000
<i>Halva</i>.. . . . .	..kg.	3,500,000	3,500,000
<i>Loucoum</i> (Turkish Delight).. . . . .	..kg.	3,500,000	3,500,000
Confectionery.. . . . .	..kg.	3,000,000	3,000,000
Chocolate.. . . . .	..kg.	1,000,000	1,000,000
Starch.. . . . .	..kg.	450,000	350,000
<i>Faccula</i> sugar.. . . . .	..kg.	300,000	300,000
Flour.. . . . .	..kg.	950,000,000	820,000,000
Alimentary pastes.. . . . .	..kg.	16,700,000	14,700,000
Yeast.. . . . .	..kg.	540,000	530,000
Canned fruits and vegetables.. . . . .	..kg.	2,500,000	2,000,000
<i>Rexcence</i> oil.. . . . .	..kg.	13,500,000	10,000,000
Ordinary soap.. . . . .	..kg.	25,000,000	25,000,000
Toilet soap.. . . . .	..kg.	450,000	450,000
Chemical fertilizers.. . . . .	..kg.	102,002,000	55,800,000
Organic dyes.. . . . .	..kg.	122,900	119,500
Black resin.. . . . .	..kg.	7,300,000	8,500,000
Turpentine.. . . . .	..kg.	1,925,000	2,260,000
Explosives.. . . . .	..kg.	1,750,000	1,873,000
Electric bulbs.. . . . .	..units	270,000	247,000
Linseed oil.. . . . .	..kg.	1,280,000	1,035,000
Sole leather.. . . . .	..kg.	5,550,000	7,000,000
Thin leather.. . . . .	..kg.	1,500,000	1,800,000
Cardboard.. . . . .	..kg.	11,500,000	9,500,000
Insulating paper tubes.. . . . .	..metres	400,000	400,000
Hats.. . . . .	..units	740,000	940,000
Felt hats.. . . . .	..units	53,650	100,000
Cigarettes.. . . . .	..kg.	4,731,200	4,592,570
Cigars.. . . . .	..kg.	17,060	12,570
Electric current.. . . . .	..kw. hrs.	70,000,000	60,000,000

Imports.—In spite of its development, Greek industry is far from being able to meet local requirements. In fact, except for a few commodities which are produced in quantities sufficient for or surpassing the local needs, this country is almost entirely dependent on foreign producers, for manufactured articles. Imports of manufactured goods amounted in 1929 to 5,029,706,300¹ paper drachmae and to 4,746,612,700¹ paper drachmae for the preceding year, whilst exports were valued at 489,039,000² paper drachmae in 1929 and 423,003,900² paper drachmae in 1928.

ELECTRIC INDUSTRY

Electric generating stations for lighting and industrial purposes are to be found in all the Greek towns of primary and secondary importance. In Athens and Piraeus electricity is also developed for operating tramways, within the limits of these towns and between the port and the capital as well as between Athens and Kiphissia. There also exists in Salonica an electric railway system. The annual consumption of electricity in Greece for industrial, transportation and lighting purposes amounts to approximately 70,000,000 kilowatt hours.

¹ Excluding the value of the flour imported (177,122,732 paper drachmae in 1929 and 300,845,706 paper drachmae in 1928).

² Excluding the value of the wine and olive oil exported (wine, 567,837,677 paper drachmae in 1929 and 492,822,416 paper drachmae in 1928; olive oil, 249,571,400 paper drachmae in 1929 and 144,750,401 paper drachmae in 1928).

According to the Ministry of Communications the amount of electricity annually consumed in Athens and Piræus is approximately 30,625,000 kilowatt hours, as follows:—For operating tramways, 12,000,000; for operating industrial plants, 2,625,000; for lighting purposes, 16,000,000. As for the amount of electricity consumed in the other principal towns in Greece for all purposes, the figures are as follows:—Salonica, 8,400,000 kilowatt hours; Calamata, 520,000; Trikkala, 175,000; Chalkis, 200,000; Jannina, 330,000; Syra, 340,000; Candia, 1,055,000; Larissa, 325,000; Naoussa, 275,000; Verria, 1,065,000; Xanthi, 340,000; Serres, 270,000; Chios, 275,000; Cavalla, 765,000; Lamia, 300,000; Volo, 1,235,000; Drama, 425,000 kilowatt hours. It is estimated that the water-power obtainable from the flow of Greek rivers and waterfalls is fully 1,500,000 horse-power, but so far this invaluable source of cheap power has remained practically unexploited, and Greek industries are largely dependent on imported coal and fuel oil to produce the power required.

III

Economic and Commercial Situation

ERA OF DIFFICULTIES

Almost universal since shortly after the Great War, the economic and commercial crisis could not fail to react most unfavourably upon the mercantile and financial activities of Greece. In addition to this crisis, a series of extraordinary local factors have combined to accentuate the already difficult situation. During ten years of continuous mobilization and warfare (1912-22), not only was practically the entire man-power of the nation non-productive, but the slender financial resources of the country were in a state of chronic depletion, and excessive borrowing was necessary in order to maintain the fighting forces and provide guns, ammunition and stores. The successful Balkan wars of 1912-13 were succeeded by the Great War, which, although virtually ended for most nations in November 1918, continued to drain the man-power and national resources of Greece until the autumn of 1922 and terminated in the military disaster of Asia Minor. The epilogue to this prolonged period of wars and national disorganization was supplied by the influx of close on one and one-half million refugees (1922-23), who reached Greece in all stages of destitution, without food or clothing, morally and financially broken, hopeless and dispirited, pouring into a needy country already impoverished and staggering under overwhelming difficulties. No other nation, great or small, has ever before had to confront the cumulative effects of such a series of national hardships and disasters. Distressing financial difficulties, heavy external and internal obligations (especially debt and settlement of refugees), political indetermination, considerable deficits of the State budget and trade balance, hectic fluctuations in exchange, unemployment—all these were the lot of Greece. However, the Greek nation, with remarkable fortitude and economic vitality, has faced, met and to some extent already overcome these apparently insuperable difficulties. In fact, political stability has been restored, progress has been observed in the chief elements in the national life, whilst the last two budgets have shown an appreciable surplus, and the trade balance, although still unfavourable, is largely offset by such invisible exports as mercantile marine freights, remittances from emigrants, and expenditures by tourists.

PERIOD OF PROGRESS

General progress in the national economy is immediately apparent when a comparison is made between the figures of 1929 and those of the past few years in agricultural production, industry, commerce, and State finance. The value

of agricultural production, in paper drachmae, for the years 1925 to 1928 was as follows: 1925, 7,392,671,626; 1926, 8,945,077,164; 1927, 10,588,327,430; 1928, 11,596,324,259. The 1929 figures are not available but the Ministry of Agriculture advises that agricultural production was last year slightly higher than in 1928.

The value of industrial production, excluding flour, olive oil, and wine, for the years stated, in paper drachmae, was: 1925, 4,887,700,000; 1926, 5,475,000,000; 1927, 6,640,000,000; 1928, 7,112,750,000; 1929, 7,157,265,000.

Imports into and exports from Greece for the years 1925 to 1929—the exports being given within parentheses—were as follows (values in paper drachmae): 1925, 10,209,523,091 (4,541,360,152); 1926, 10,004,939,000 (5,429,751,000); 1927, 12,601,948,000 (6,037,411,000); 1928, 12,409,122,000 (6,282,075,000); and 1929, 13,275,531,000 (6,985,196,000).

STATE FINANCE

Fiscal Year	Actual Revenue In Paper	Actual Expenditure Drachmae	Surplus
1924-1925	5,757,064,569	5,510,092,522	246,972,047
1925-1926	8,065,656,221	6,842,829,870	1,222,826,350
1926-1927	9,439,710,540	8,690,397,478	749,313,062
1927-1928	8,996,649,989	7,771,363,200	1,225,286,788
1928-1929	10,551,823,842	9,457,832,945	1,093,990,896

To present a more complete picture of the situation, the figures pertaining to mercantile marine returns, remittances from emigrants and revenue derived from the tourist trade, which are real assets in the economic life of this country, are given hereafter:—

MERCANTILE MARINE FREIGHTS

Year	Gross Revenue In Pounds	Net Revenue Sterling
1926	6,862,000	1,300,000
1927	5,200,000	1,355,000
1928	4,700,000	1,200,000
1929	5,363,700	1,130,000

Remittances from emigrants were valued as follows for the years from 1925 to 1929 inclusive: 1925, 7,304,152; 1926, 7,369,082; 1927, 6,923,188; 1928, 6,431,548; 1929, 7,778,007.

The revenue derived from tourists' expenditures is estimated as follows: 1925, 250,000; 1926, 260,000; 1927, 300,000; 1928, 350,000; 1929, 400,000.

In turn, the banking situation was in 1929 much better than during the past few years, according to information gathered in banking circles. The figures for 1929 and 1928 are as follows:—

	On December 31			
	1929 State Bank In Thousands of	1928 State Bank In Thousands of	1929 Other Banks Paper Drachmae	1928 Other Banks Paper Drachmae
<i>Assets—</i>				
Banknotes in hand . . . . .	.....	.....	516,713	513,390
Deposits in banknotes with the State Bank . . . . .	.....	.....	547,223	657,187
Deposits in banknotes with other banks in Greece . . . . .	.....	.....	559,357	250,013
Gold in bars	640,587	553,722	12,151	9,574
Foreign exchange	4,134,585	4,590,493	1,219,314	1,506,164
Credits extended in Greece	133,757	37,962	6,386,930	5,832,112
Bills discounted in Greece	157,013	55,682	2,804,835	2,559,421
Foreign currencies	2,309	162	29,995	52,219
<i>Liabilities—</i>				
Deposits in drachmae:				
At sight and savings bank	1,529,385	2,108,631	6,898,988	6,409,437
Time deposits	1,529,385	637,798	1,810,716	974,356
Deposits in gold or foreign exchange:				
At sight	1,658,087	936,327	3,899,076	3,536,837

It can therefore be stated in the light of the above figures, that the economic and commercial conditions which prevailed in Greece during 1929 showed progress as compared with the past few years and especially with 1925.

CAUSES OF PRESENT DIFFICULTIES

The principal contributory causes of the persistent economic and commercial difficulties of Greece are: Heavy financial obligations and high taxation; enormously increased cost of living, inflation and subsequent stabilization of the Greek currency; shortage of arable land and considerable imports of cereals; low prices obtaining for agricultural produce in the world markets and comparatively large stocks of tobacco, currants and wine still unsold; reduced benefits in industry and accrued stocks of industrial products on hand; fall in prices on certain stocks bought abroad.

FINANCIAL OBLIGATIONS AND HIGH TAXATION

Greece's indebtedness, together with the expenditure occasioned by administration, army, the settlement of refugees, public works, and the Government's general constructive policy, impose a heavy financial burden upon the nation. In fact, whilst the yearly national income is placed at 47,000,000,000 drachmae, fiscal taxes amount to approximately 23 per cent of this figure, or 10,500,000,000 drachmae, which in turn represents the estimated revenue of the State, the service of the public debt absorbing 25 per cent of this revenue, army and administration combined 38 per cent, and public works together with the settlement of refugees and the Government's constructive policy, an appreciable part of the remainder. It consequently follows that on the one hand the State budget, when brought down to a per capita basis, is equal to about 1,695 drachmae as compared with 7,580 drachmae for Greece's yearly income, and that on the other the so-called non-productive expenditure—service of public debt, army and administration—stands per head of population at the abnormally high figure of 1,067 drachmae, or 423 drachmae for the service of the public debt and 644 drachmae for army and administration. The public debt itself amounted on September 30, 1929, to 37,875,000,000 drachmae, or 6,130 drachmae per capita. To the public debt has been recently added an amount of 159,375,000 drachmae or 26 drachmae per head of population in connection with the Turko-Greek Agreement. These figures illustrate in a striking manner the Greek financial situation to-day. This situation, although far from being bright, does not engender pessimism in the country; the people are confident that the productive works at present being carried on, in spite of the heavy financial sacrifices they entail, will eventually bring about returns which will assist in meeting the obligations of Greece. In fact, the endeavours of the Government to settle large numbers of the refugee population on the land and to render them self-supporting, the drainage and reclamation of vast marshes and wide-spreading swamps, the utilization of the surplus waters for systematic irrigation, the transformation of the unexploited water power of the country into productive energy, the linking up of all sections of Greece with a network of good motor roads, the various measures adopted for obtaining an increased yield of agricultural produce, the development of Greece as a tourist resort—all these measures, although contributing to load at present the shoulders of the taxpayers with heavy financial burdens, promise well for the future, and it is predicted that Greece will eventually become prosperous, provided political stability continues to prevail.

The clear result of the heavy financial obligations of the Greek nation is high taxation. However, quite a good surplus having been derived from the budgets for the last two fiscal years—1,225,286,788 drachmae for 1927-28 and

1,093,990,896 drachmae for 1928-29—the Government has already effected some tax reductions, principally on agricultural produce, and has announced further amortisations of the national debt, its intention being to continue this policy in future if conditions permit. Tax reductions, if maintained, will no doubt prove of benefit to commerce in general, as high taxation is really one of the great evils from which Greek commerce now suffers.

COST OF LIVING, INFLATION AND STABILIZATION

The cost of living has enormously increased. Inflation created a fictitious prosperity which favoured increased purchases and an abnormal increase in the number of commercial enterprises. In turn, the stabilization of the currency having eliminated the profits derived from fluctuations in exchange and put an end to this fictitious prosperity, obliged merchants to content themselves with purely business profits and consumers to restrict their purchases, whilst the excessive number of merchants—a consequence of both the period of inflation and the influx of refugees—brought about a more extensive division of business profits and a restriction of capital in circulation, together with a rarity of cash sales, difficulties in effecting payments, and failures. It might be added that Greek importers have also of late been involved in difficulties resulting from large decline in prices of some of the commodities bought abroad and from the consequent obligation of disposing of their stocks at a loss. Great caution should be exercised under the circumstances when dealing with this market and credit facilities extended only after mature deliberation.

AGRICULTURAL CONDITIONS

Although agriculture, which is the principal source of revenue in Greece and represents a considerable share of Greek exports, assumes greater importance from year to year, and no efforts are being spared by the Government eventually to render the country self-supporting in agricultural produce, heavy imports of cereals are an adverse factor having an important bearing on the general economic situation. The simple statement that two out of every three pounds of bread consumed in Greece have to be imported and paid for in gold currency at the present depreciated rate of exchange affords a most striking example of the inadequate food production of the country and of the enormous capital which has to be exported every year in purchase of wheat and flour from abroad. To aggravate the situation, prices obtained for local agricultural produce sold in foreign countries owing to a world-wide fall in prices, are too low to allow reasonable profits to the peasants. Large stocks of tobacco, wine and currants have until now remained unsold in the ports, and the fact that large quantities of agricultural produce have not been disposed of is a bad blow to Greek economy.

The principal Greek exports of agricultural produce or produce derived from agriculture were:—

	Five months ended May 31	
	1930	1929
	In Metric Tons	
Currants.. . . .	12,112	12,913
Tobacco	17,021	24,650
Sultanas.. . . .	1,932	2,658
Figs.. . . .	8,710	10,538
Wine.. . . .	29,892	61,005
Olive oil.. . . .	1,782	10,285

The volume of Greek industrial production in 1929 showed a considerable increase over 1928, though in value, the increase was negligible (7,157,265,000

drachmae in 1929, compared with 7,112,750,000 in 1928). This was due to a general fall in prices, occasioned by the keen competition among Greek manufacturers in their efforts to reduce stocks, as a result, financial difficulties were encountered, and failure was experienced by many smaller plants. Conditions have not changed sensibly since the close of last year. However, it has been noticed recently that there was in enterprises of the same nature a tendency to amalgamate, the intention being to create stronger organizations which will be able to produce at lower cost and face competition.

Although Greek industry exercises its activities in various fields, except for cotton, silk and cigarette factories, it is not of great importance: Greece is tributary to foreign markets for a large range of manufactured goods.

IV

External Trade

Greece's external trade in 1929 as compared with 1928 showed increases in both total exports and imports, the latter amounting during the past year to 2,774,698 metric tons valued at 13,275,531,000 drachmae and 2,359,156 metric tons estimated at 12,409,122,000 drachmae in 1928, whilst the former in 1929 totalled 748,743 metric tons valued at 6,985,196,000 drachmae and 645,493 metric tons amounting to 6,282,075,000 drachmae in the preceding year, the unfavourable balance of trade thus standing at 6,290,335,000 drachmae in 1929 as against 6,127,047,000 drachmae in 1928. As already stated, the trend of Greece's external trade has shown constant improvement during the past few years. On the other hand, for the five months ended May 31, 1930, as compared with the corresponding period in the previous year, an appreciable decrease has taken place in both exports and imports. The fall in exports is mainly due to the fact that the staple agricultural products, that is tobacco, currants and wine found a more limited sale abroad on account of the world markets being overstocked in (tobacco), of the over-production of wine, or of competition from other countries becoming keener in the case of (currants). As a result of this reduction in exports, the purchasing power of the population has been restricted in some measure and imports have decreased. The detailed figures for the five months ended May 31, 1930 and 1929, are to be found hereafter in table form:—

Imports into Greece

Month	Five months ended May 31		Difference
	1930	1929	
	In	Metric Tons	
January..	194,039	225,445	— 31,406
February..	188,557	193,572	— 10,015
March..	227,595	211,880	+ 15,715
April..	193,030	265,551	— 72,521
May..	183,337	242,140	— 58,803
Total..	986,558	1,143,588	— 157,030

It is estimated that imports and exports for the whole of 1930 will show an appreciable decline.

IMPORTS BY CATEGORIES

The principal categories of goods imported into Greece comprise the following: Live stock and fishery; agricultural products; colonial goods and vegetable products; oils and oil seeds; spirituous beverages; sugar and confectionery products; leather, leather goods and hides; forest products and articles

in wood; minerals; metal and metal goods; pottery and glassware; industrial and pharmaceutical chemicals; perfumery and soap; colours and tanning materials; paper and paper goods; textiles; and machinery. Agricultural products represent by far the largest item. Imports by categories for 1929 and 1928 were detailed as follows, quantity, tonnage and value being taken into consideration:—

Greek Imports by Categories

Categories—	1929		1928	
	Metric Tons	In 1000 Paper Drachmae	Metric Tons	In 1000 Paper Drachmae
Live stock and fishery.. . . .	34,692	1,105,923	32,011	1,005,882
Agricultural products.. . . .	786,928	3,551,007	646,757	3,149,321
Colonial goods and vegetable products..	31,345	344,694	24,670	308,062
Oils and oil seeds.. . . .	58,523	171,262	35,437	182,951
Spirituuous beverages.. . . .	3,367	35,592	2,968	31,575
Sugar and confectionery products.. . .	67,074	364,217	64,614	492,562
Leather, leather goods and hides.. . .	6,399	355,715	5,054	286,672
Forest products and articles in wood..	355,853	657,973	291,696	535,356
Minerals.. . . .	1,114,365	1,268,622	976,105	1,338,622
Metals and metal goods.. . . .	163,843	1,482,848	152,812	1,380,847
Scientific and musical instruments.. .	1,760	205,690	1,689	167,972
Pottery and glassware.. . . .	26,577	141,316	18,331	117,096
Industrial and pharmaceutical chemicals	54,631	442,064	41,795	328,062
Perfumery and soap.. . . .	296	28,161	262	25,464
Colours and tanning materials.. . . .	9,399	108,707	8,108	97,492
Paper and paper goods.. . . .	25,057	211,252	23,908	270,431
Rubber and rubber goods.. . . .	869	64,820	918	68,468
Textiles.. . . .	24,188	2,058,411	24,051	2,007,811
Sporting goods and toys.. . . .	104	14,667	87	12,749
Hats.. . . .	107	46,590	107	35,616
Vehicles.. . . .	8,399	422,571	5,391	308,453
Ammunition and explosives.. . . .	85	17,207	158	18,922
Marine vessels.. . . .	421	103,864	1,847	166,279
Miscellaneous.. . . .	416	72,358	380	74,081
Total.. . . .	2,774,698	13,275,531	2,359,156	12,409,122

IMPORTS BY COMMODITIES

Details as to tonnage and countries of origin of Greek imports, which might be of general or immediate interest to Canadian exporters, are being given hereafter in the light of Greek official statistics for 1929 and 1928, the figures within parentheses referring to 1928:—

Tinned Meat.—Total imports, 265,306 (236,370) kg.: Bulgaria,, 446 (717); France, 25,628 (33,126); Yugoslavia, 13,703 (6,201); Denmark, 4,052 (3,123); United States, 2,294 (2,493); Italy, 21,768 (22,183); Netherlands, 33,963 (15,786); Great Britain, 10,872 (8,611); Roumania, 537 (396); Russia, 8 (784); Turkey, 96,459 (96,102).

Cheese.—Total imports, 1,503,124 (1,042,465) kg.: Albania, 131,471 (25,947); France, 30,140 (32,745); Yugoslavia, 418,523 (237,298); Switzerland, 55,601 (44,065); United States, 1,776 (2,428); Italy, 81,752 (72,415); Netherlands, 12,913 (9,850); Great Britain, 3,378 (1,666); Roumania, 342,868 (17,049); Russia, 50,827 (360,506); Turkey, 69,153 (44,852).

Butter.—Total imports, 697,246 (531,557) kg.: Egypt, 20,711 (19,678); Albania, 15,901 (5,792); Yugoslavia, 168,105 (97,030); Denmark, 10,410 (10,466); United States, 103 (17,291); Italy, 16,253 (5,768); Italian Africa, 14,510 (945); Netherlands, 85,569 (92,916); Roumania, 65,159 (26,934); Russia, 77,837 (190,924); Turkey, 91,477 (11,052); Tripoli, 28,918 (18,945).

Condensed Milk.—Total imports, 3,573,767 (3,672,994) kg.: France, 239,818 (229,905); Denmark, 37,933 (19,157); Switzerland, 2,072,991 (2,159,557); United States, 44,925 (8,982); Italy, 373,615 (388,621); Netherlands, 462,639 (559,376); Great Britain, 102,340 (82,591); Norway, 3,281 (5,415).

Powdered Milk.—Total imports, 48,289 (47,817) kg.: Switzerland, 42,861 (44,323); Italy, 395 (217); Netherlands, 1,858 (—).

Herrings.—Total imports, 3,408,881 (3,047,617) kg.: France, 58,448 (6,442); Netherlands, 273,451 (201,505); Great Britain, 3,063,410 (2,826,354); Norway, 10,917 (7,830).

Fish, General.—Total imports, 6,466,771 (5,005,697) kg.: Algeria, 289,575 (495,523); France, 137,364 (81,187); United States, 899,467 (471,075); Spain, 120,591 (480,208); Italy, 163,295 (100,890); Netherlands, 54,067 (69,742); Great Britain, 109,753 (41,282); Norway, 691,170 (459,162); Portugal, 1,940,156 (1,670,917); Turkey, 1,302,121 (684,927); Tunis, 164,624 (55,655).

Codfish.—Total imports 8,927,286 (9,889,270) kg.: France, 6,255,938 (5,838,557); United States, 37,812 (4,007); Canada, 1,932,931 (3,750,990); Great Britain, 435,508 (282,808).

Wheat.—Total imports 597,909 (475,992) metric tons: British India, 302 (2,765); Egypt, 1,408 (2,029); Argentine, 56,095 (48,073); Australia, 29,455 (6,025); Bulgaria, 3,780 (6,367); Yugoslavia, 14,875 (1,439); United States, 299,697 (233,710); Canada, 143,499 (169,261); Hungary, 33,048 (—); Roumania, 13,043 (3,597); Russia, 10 (2,422); Turkey, 152 (277).

Wheat Flour.—Total imports, 31,222 (49,124) metric tons: Egypt, 1,427 (1,424); Australia, 2,443 (3,736); Bulgaria, 193 (2,530); France, 588 (1,443); Yugoslavia, 189 (40); United States, 20,918 (35,427); Italy, 3,082 (91); Canada, 1,241 (3,707); Hungary, 992 (164).

Potatoes.—Total imports, 32,093,871 (37,512,565) kilogrammes: Egypt, 2,464,557 (3,625,690); France, 1,083,237 (1,679,893); Yugoslavia, 198,767 (58,154); Italy, 339,544 (128,924); Cyprus, 8,348,032 (6,343,620); Hungary, 6,674,458 (9,727,367).

Sugar.—Total imports, 63,290 (60,847) metric tons: British India, 31 (502); Egypt, 8 (119); Austria, 12 (27); Yugoslavia, 2,166 (68); United States, 84 (357); Italy, 652 (858); Netherlands, 49 (24); Great Britain, 104 (338); Dutch Indies, 4,267 (9,054); Hungary, 6,637 (6,877); Czechoslovakia, 48,856 (37,390).

Molasses.—Total imports, 2,307,601 (2,454,067) kilogrammes: Egypt, — (399,773); United States, 365 (24).

Jams and Marmalades.—Total imports, 6,432 (9,238) kilogrammes: Egypt, 2,493 (2,069); France, 269 (250); Switzerland, 375 (247); United States, 690 (555); Italy, 159 (113); Great Britain, 1,891 (5,250).

Raw Hides.—Total imports, 5,821,998 (4,520,120) kilogrammes: Abyssinia, 236,014 (213,486); British India, 1,642,305 (1,203,070); Egypt, 298,086 (602,762); Algeria, 132,465 (42,057); Argentine, 578,259 (343,240); Belgium, 99,639 (17,132); France, 387,732 (412,029); French Africa, 36,630 (9,573); Germany, 76,804 (99,340); United States, 316,301 (141,796); Italy, 175,184 (86,590); Italian Africa, 21,212 (19,316); Netherlands, 34,725 (62,077); Turkey, 15,403 (7,854).

Leather.—Total imports, 341,506 (320,261) kilogrammes: Belgium, 63,809 (45,792); France, 106,443 (105,182); Germany, 38,630 (33,150); United States, 73,935 (80,896); Italy, 4,729 (2,175); Great Britain, 6,060 (9,440).

Leather Belting.—Total imports, 75,811 (77,054) kilogrammes: Belgium, 24,213 (35,096); France, 14,502 (10,335); Germany, 15,307 (9,595); United States, 456 (770); Great Britain, 5,281 (10,309).

Leather Shoes.—Total imports, 5,817 (3,280) kg.: France, 826 (653); United States, 2,833 (1,439); Great Britain, 363 (381).

Lumber for Building Purposes.—Total imports, 436,327 (364,781) cubic metres: Austria, 2,793 (1,733); Bulgaria, 574 (1,525); France, 932 (431); Germany, 1,570 (386); Yugoslavia, 200,209 (178,002); United States, 3,984 (1,890); Italy, 5,475 (4,312); Roumania, 181,909 (146,920); Sweden, 32,745 (24,106); Turkey, 390 (374); Czechoslovakia, 3,090 (3,724).

Lumber for Staves.—Total imports, 10,157,550 (5,622,351) kilogrammes: France, 22,382 (29,850); Yugoslavia, 7,593,655 (4,505,291); United States, 27,184 (4,877); Italy, 642,772 (102,504); Roumania, 568,841 (267,952); Turkey, 266,490 (477,173).

Lumber for Furniture Making.—Total imports, 1,178,111 (755,319) kilogrammes: France, 280,345 (249,642); United States, 46,355 (62,236); Italy, 9,089 (20,050); Roumania, 14,348 (—); Turkey, 10,411 (5,114).

Cement.—Total imports, 75,935 (70,798) metric tons: Belgium, 11,809 (6,081); France, 1,548 (1,138); Yugoslavia, 23,109 (17,399); Italy, 7,979 (8,276); Russia, 21,009 (13,195); Czechoslovakia, 531 (341).

Iron Sheets.—Total imports, 26,831 (21,264) metric tons: Belgium, 11,298 (9,062); France, 560 (460); Germany, 877 (1,123); United States, 2,429 (1,304); Great Britain, 11,629 (9,260).

Workmen's Tools.—Total imports, 1,085,155 (946,454) kg.: Belgium, 45,443 (79,079); France, 343,474 (361,821); Germany, 448,554 (361,866); United States, 37,096 (18,895); Italy, 9,298 (4,383); Netherlands, 6,188 (1,682); Great Britain, 101,082 (70,902); Czechoslovakia, 14,065 (1,486).

Iron Tubes and Tubing.—Total imports, 10,996,301 (8,928,590) kg.: Belgium, 2,475,699 (2,535,275); France, 3,957,086 (1,125,675); Germany, 2,790,797 (2,030,955); United States, 69,017 (121,726); Italy, 91,099 (41,720); Netherlands, 41,004 (561,955); Great Britain, 1,134,547 (2,139,260).

Safes.—Total imports, 258,236 (113,142) kg.: France, 87,331 (17,116); Germany, 78,503 (11,439); United States, 23,875 (16,468); Great Britain, 45,018 (13,030); Turkey, 764 (900).

Electric Lamps.—Total imports, 112,467 (107,129) kilogrammes: Austria, 14,037 (17,219); France, 11,499 (10,428); Germany, 53,947 (52,326); United States, 908 (777); Italy, 4,752 (3,262); Netherlands, 557 (269); Great Britain, 1,525 (1,459); Hungary, 7,051 (6,903); Czechoslovakia, 13,450 (13,226).

Engines, Steam, Kerosene, Gasoline, etc.—Total imports, 2,849,960 (3,438,683) kilogrammes: Austria, 19,935 (78,093); Belgium, 74,777 (223,630); France, 43,546 (33,378); Germany, 1,411,343 (1,046,628); Switzerland, 42,590 (232,439); United States, 125,015 (51,888); Italy, 46,096 (66,511); Great Britain, 728,770 (1,479,542).

Tractors.—Total imports, 91,672 (70,504) kg.: France, — (690); Germany, 20,522 (1,420); United States, 12,533 (—); Great Britain, 58,617 (53,744).

Dynamos and Electric Motors.—Total imports, 746,576 (715,813) kg.: Austria, 76,451 (49,751); Belgium, 37,859 (40,438); France, 55,159 (59,456); Germany, 347,693 (415,602); Italy, 31,706 (19,417); Great Britain, 83,186 (57,970); Sweden, 10,878 (8,878).

Pumps.—Total imports, 449,986 (520,533) kg.: Austria, 13,321 (40,749); Belgium, 18,255 (15,146); France, 68,325 (101,621); Germany, 135,944 (135,852); United States, 149,701 (137,671); Italy, 20,742 (22,657); Great Britain, 18,316 (45,747).

Industrial Machinery.—Total imports, 8,045,772 (6,009,084) kg.: Austria, 124,664 (125,808); Belgium, 364,334 (176,166); France, 896,551 (622,181); Germany, 3,436,582 (3,072,704); Switzerland, 218,809 (461,874); United States, 672,462 (267,995); Italy, 308,595 (195,236); Netherlands, 1,110 (2,164); Great Britain, 1,791,629 (989,623); Czechoslovakia, 80,222 (44,340).

Agricultural Machinery.—Total imports, 2,432,295 (3,011,779) kg.: Austria, 70,404 (167,853); Belgium, 4,544 (25,962); France, 374,936 (406,756); Germany, 834,347 (633,656); United States, 560,475 (692,628); Italy, 21,137 (36,606); Great Britain, 269,443 (544,134).

Lead.—Total imports, 1,238,773 (1,175,048) kg.: Belgium, 385,898 (317,511); France, 584,567 (427,791); Germany, 145,626 (305,645); United States, 5,312 (22,305); Great Britain, 106,705 (101,746).

Tin.—Total imports, 197,648 (18,222) kg.: France, 17,729 (2,986); United States, 2,015 (2,907); Great Britain, 162,758 (162,455).

Zinc.—Total imports, 476,665 (380,725) kg.: Belgium, 289,296 (262,184); France, 41,602 (25,646); Germany, 56,270 (23,682); Great Britain, 12,884 (44,873).

Copper and its Alloys.—Total imports, 45,442 (82,050) kg.: Belgium, — (59,043); France, 27,211 (1,127); Germany, 14,093 (17,711); Great Britain, 1,961 (3,474).

Nickel.—Total imports, 3,334 (1,580) kg.: Austria, 612 (853); Germany, 2,069 (516).

Aluminium.—Total imports, 47,196 (21,814) kg.: France, 6,493 (5,360); Germany, 15,590 (3,982); Switzerland, 22,108 (10,625); Great Britain, 2,690 (414).

Metallic Mercury.—Total imports, 2,547 (1,327) kg.: Germany, 869 (172); Italy, 161 (887); Great Britain, 258 (102).

Silver.—Total imports, 60 (12) kg.:

Gold or Platinum.—Total imports, 2,060 (150) kg.: France, 90 (—); Germany, 1,070 (—).

Typewriters.—Total imports, 32,612 (24,066) kg.: Austria, 206 (114); France, 821 (532); Germany, 10,415 (7,804); United States, 17,307 (13,349); Italy, 205 (148); Great Britain, 3,368 (1,858).

Photographic Instruments.—Total imports, 14,025 (7,704) kg.: France, 1,548 (302); Germany, 5,533 (2,921); United States, 5,639 (3,805); Great Britain, 524 (378).

Phonographs.—Total imports, 209,672 (166,232) kg.: France, 10,734 (6,536); Germany, 58,802 (73,998); United States, 16,788 (43,362); Italy, 1,248 (376); Great Britain, 89,175 (47,689).

Tartaric Acid.—Total imports, 176,944 (158,383) kg.: France, 58,118 (46,255); Germany, 23,058 (12,111); Italy, 93,610 (99,696).

Carbonate of Potash.—Total imports, 315,126 (254,717) kg.: Belgium, 30,193 (26,672); France, 9,100 (90,269); Germany, 128,821 (2,210); Great Britain, 36,418 (121).

Carbonate of Soda.—Total imports, 4,282,676 (4,368,496) kg.: Egypt, 33,577 (50,762); Belgium, 3,186,372 (1,150,302); France, 28,724 (2,024,120); Germany, 243,317 (137,419); United States, 776 (22,750); Italy, 76,188 (179,536); Netherlands, 20,087 (—); Great Britain, 672,201 (758,218).

Copper Sulphate.—Total imports, 3,408,999 (2,540,653) kg.: France, 150,230 (247,540); Germany, 400,355 (204,972); Italy, 26,943 (27,121); Great Britain, 2,631,938 (2,041,251).

Iron Sulphate.—Total imports, 3,440 (528) kg.: France, 500 (513); Germany, 109 (15).

Calcium Chloride.—Total imports, 517,916 (479,445) kg.: France, 80,743 (156,622); Germany, 198,794 (74,309); Italy, 46,669 (106,907); Great Britain, 188,365 (136,021).

Naphthaline.—Total imports, 560,881 (538,813) kg.: Belgium, 129,078 (145,527); France, 276 (10,108); Germany, 378,391 (329,277); Italy, 3,422 (3,390); Great Britain, 47,824 (46,617).

Glycerine.—Total imports, 114,151 (170,819) kg.: France, 62,181 (436,338); Germany, 14,561 (64,875); Netherlands, 3,490 (5,237); Great Britain, 33,213 (59,632).

Chemical Fertilizers.—Total imports, 15,798,858 (15,106,750) kg.: Belgium, 513,915 (1,301,089); France, 1,197,594 (1,899,492); Germany, 10,304,365 (6,674,729); United States, 1,800,873 (2,762,684); Netherlands, 654,393 (630,632).

Patent Medicines.—Total imports 102,456 (95,019) kg.: France, 47,291 (46,299); Germany, 16,544 (14,934); Switzerland, 10,401 (6,234); United States, 15,714 (12,813); Italy, 1,224 (2,303); Great Britain, 8,959 (10,194).

Tanning Material.—Total imports, 4,016,179 (3,749,343) kg.: Egypt, 28,516 (16,443); Argentine, 1,688,730 (1,392,045); Belgium, 12,498 (42,220); France, 836,076 (806,878); Germany, 171,494 (128,490); United States, 4,915 (26,363); Italy, 327,922 (367,451); Great Britain, 27,128 (20,877); Turkey, 605,827 (639,562).

Cellulose.—Total imports, 6,950,765 (4,272,755) kg.: Sweden, 5,864,690 (3,579,864).

Cardboard.—Total imports, 2,067,315 (2,285,020) kg.: Austria, 601,431 (584,638); Belgium, 34,378 (14,136); France, 739,988 (625,560); Germany, 313,218 (436,822); Yugoslavia, 45,926 (67,464); Italy, 34,129 (84,846); Great Britain, 47,254 (51,518); Sweden, 90,696 (170,612); Czechoslovakia, 82,412 (147,915).

Wrapping Paper.—Total imports, 2,130,006 (2,636,853) kg.: Austria, 159,283 (145,503); Belgium, 173,704 (253,573); France, 29,106 (43,842); Germany, 513,342 (797,857); United States, 4,848 (3,022); Italy, 123,819 (103,320); Netherlands, 65,777 (148,726); Great Britain, 51,317 (39,139); Sweden, 436,976 (613,845); Czechoslovakia, 498,457 (411,489).

Newsprint.—Total imports, 7,568,842 (9,168,242) kg.: Austria, 260,959 (334,363); Belgium, 88,431 (21,600); Germany, 4,005,230 (5,128,469); Italy, 298,303 (704,133); Netherlands, 23,806 (10,071); Sweden, 1,583,210 (1,454,973).

Writing Paper.—Total imports, 2,091,732 (2,248,438) kg.: Austria, 522,245 (529,104); Belgium, 46,726 (45,593); Germany, 234,996 (385,561); Yugoslavia, 198,766 (323,248); Italy, 14,810 (24,450); Netherlands, 115,857 (157,709); Great Britain, 30,179 (29,873); Sweden, 11,546 (411,322); Czechoslovakia, 107,119 (214,505).

Blotting Paper.—Total imports, 39,975 (33,064) kg.: France, 15,374 (11,091); Germany, 8,276 (4,589).

Rubber Tubing and Hose.—Total imports, 59,086 (41,258) kg.: France, 10,053 (11,906); Germany, 12,342 (6,394); United States, 9,178 (5,354); Italy, 3,383 (1,687); Great Britain, 4,514 (1,695); Czechoslovakia, 2,557 (3,980).

Rubber Cloth and Goods.—Total imports, 201,235 (162,456) kg.: Austria, 16,059 (11,050); Belgium, 4,825 (5,100); France, 26,797 (24,368); Germany, 30,781 (28,530); United States, 21,928 (22,872); Italy, 20,599 (18,630); Great Britain, 50,225 (34,709); Hungary, 5,047 (733); Czechoslovakia, 7,721 (8,081).

Jute Bags, Old and New.—Total imports, 1,951,193 (1,883,228) kg.: British India, 760,899 (711,473); Egypt, 183,779 (252,139); Belgium, 24,224 (34,365); France, 5,613 (22,621); Germany, 1,442 (1,152); United States, 178,216 (301,370); Italy, 169,519 (160,378); Netherlands, 81,708 (31,342); Great Britain, 276,574 (189,518); Czechoslovakia, 213,165 (79,492).

Motor Vehicles.—Total imports, 3,440 (2,175) units: France, 175 (181); Germany, 587 (18); United States, 2,491 (1,802); Italy, 125 (76); Great Britain, 36 (49).

Chassis with or without Motor.—Total imports, 1,991,959 (1,038,644) kg.: France, 330 (8,200); United States, 1,945,348 (958,671); Italy, 29,780 (18,620).

Tires.—Total imports, 1,121,935 (831,117) kg.: Egypt, 36,585 (51,549); Belgium, 46,071 (29,525); France, 251,877 (210,947); Germany, 33,628 (12,660); United States, 381,777 (305,280); Italy, 222,891 (135,170); Great Britain, 135,477 (69,988).

Inner Tubes.—Total imports, 84,884 (49,129) kg.: Belgium, 3,807 (1,785); France, 22,183 (15,680); United States, 28,428 (19,476); Italy, 14,361 (5,607); Great Britain, 14,118 (3,903).

Motor Vehicle Accessories.—Total imports, 42,735 (30,746) kilogrammes: France, 1,697 (3,457); Germany, 13,411 (7,404); United States, 18,540 (4,944); Italy, 1,768 (355); Great Britain, 978 (10,277).

DISTRIBUTION OF TRADE

Greek imports and exports by countries for 1929 and 1928 were distributed as follows:—

Greek Imports and Exports by Countries

Country	Imports		Difference	Exports		Difference
	1929	1928		1929	1928	
	In Thousands of Paper Drachmae					
Egypt	257,656	267,223	— 9,567	307,208	263,345	+ 43,863
Austria	153,592	118,646	+ 34,946	177,307	88,354	+ 88,953
Belgium	486,794	506,150	— 19,356	228,124	155,916	+ 72,208
Bulgaria	243,644	254,394	— 10,750	29,717	24,142	+ 5,575
France	902,380	867,296	+ 35,084	424,655	314,168	+110,487
Germany	1,249,366	1,071,171	+178,195	1,614,089	1,627,144	— 13,355
Yugoslavia	792,791	605,453	+187,338	31,639	39,027	— 7,388
Switzerland	123,094	129,013	— 5,919	14,188	9,729	+ 4,459
United States	2,090,933	1,957,454	+133,479	1,114,048	1,256,219	—142,171
Spain	21,481	12,886	+ 8,595	683	1,220	— 537
Italy	739,232	645,895	+ 93,337	1,277,981	1,038,638	+239,343
Canada	715,784	882,312	—166,528	1,801	4,917	— 3,116
Netherlands.. . . .	269,893	210,532	+ 59,361	296,530	282,620	+13,910
Great Britain.. . . .	1,663,277	1,795,426	—132,149	826,280	827,570	— 1,290
Norway	35,789	33,459	+ 2,330	17,944	3,232	+14,712
Hungary.. . . .	239,556	108,810	+130,746	21,645	21,077	+ 568
Roumania	885,842	796,990	+ 88,852	96,872	56,658	+40,214
Russia	279,897	339,586	— 59,689	5,117	1,706	+ 3,411
Sweden	138,804	118,916	+ 19,888	233,070	40,758	+192,312
Turkey	339,054	259,048	+ 80,006	13,620	19,390	— 5,770
Czechoslovakia.. . . .	458,561	479,245	— 20,684	77,414	78,786	— 1,372
Other countries	1,188,111	949,217	+238,894	175,264	127,159	+48,105
Total	13,275,531	12,409,122	+866,409	6,985,196	6,282,075	+703,121

In 1929 the United States was the principal source of supply of the Greek market, followed by the United Kingdom, Germany, France, Roumania, Yugoslavia, Italy, and Canada. Germany, Italy, the United States, the United Kingdom, and France, in the order named, were Greece's best customers. As compared with 1928, imports from Austria, France, Germany, Yugoslavia, the United States, Spain, Italy, the Netherlands, Norway, Hungary, Roumania, Sweden, and Turkey, and exports to Egypt, Austria, Belgium, Bulgaria, France, Switzerland, Italy, the Netherlands, Norway, Hungary, Roumania, Russia and Sweden increased. On the other hand, declines were recorded in the imports from Egypt, Belgium, Bulgaria, Switzerland, Canada, Great Britain, Russia and Czechoslovakia, and in the exports to Germany, Yugoslavia, the United States, Spain, Canada, Great Britain, Turkey and Czechoslovakia.

EXPORTS BY CATEGORIES

Greek exports for 1929 and 1928 were detailed as follows, quantity, tonnage and value being given:—

Greek Exports by Categories

Categories—	1929		1928	
	Metric Tons	In 1000 Paper Drachmae	Metric Tons	In 1000 Paper Drachmae
Live stock and fishery.. . . .	685	42,241	621	57,540
Agricultural products.. . . .	4,555	13,249	10,453	20,391
Colonial goods and vegetable products..	182,101	5,268,839	188,591	4,543,112
Oils and oil seeds.. . . .	27,409	438,513	19,809	265,730
Spirituuous beverages.. . . .	139,858	622,699	126,425	525,502
Sugar and confectionery products.. . .	145	3,114	173	3,475
Leather, leather goods and hides.. . .	3,270	151,249	4,149	194,417
Forest products and articles in wood..	12,600	82,887	15,635	105,051
Minerals.. . . .	328,379	126,071	250,055	128,688
Metals and metal goods.. . . .	8,050	37,292	8,736	283,023
Scientific and musical instruments.. .	7	1,031	40	748
Pottery and glassware.. . . .	633	2,111	478	1,713
Industrial and pharmaceutical chemicals	33,052	63,470	13,385	44,835
Perfumery and soap.. . . .	1,391	16,052	1,408	17,607
Colours and tanning materials.. . . .	3,338	9,604	2,147	9,029
Paper and paper goods.. . . .	1,038	7,972	1,418	7,442
Textiles.. . . .	1,654	67,493	1,430	67,335
Hats.. . . .	3	548	2	376
Vehicles.. . . .	133	4,645	53	2,320
Ammunition and explosives.. . . .	60	2,344	9	390
Total.. . . .	748,743	6,985,196	645,493	6,282,075

Leaf tobacco is the leading item of Greek exports, followed by currants and wines, whilst agricultural produce constitute in round figures 70 per cent of Greece's total exports, as will be observed in the following table which indicates principal Greek exports by commodities:—

Greek Exports by Commodities

Commodity—	1929		1928	
	Metric Tons	In 1000 Paper Drachmae	Metric Tons	In 1000 Paper Drachmae
Leaf tobacco.. . . .	50,055	3,948,553	48,903	3,211,897
Wines.. . . .	131,664	567,837	122,551	492,822
Currants.. . . .	68,812	876,350	79,463	959,725
Dried figs.. . . .	16,870	104,039	14,560	90,643
Fresh fruit.. . . .	4,344	33,937	4,531	22,236
Olive oil.. . . .	12,176	249,571	7,581	144,750
Sultanas.. . . .	15,085	178,347	15,303	161,985
Grapes.. . . .	8,212	32,162	5,912	14,743
Olives.. . . .	12,485	161,562	8,691	98,078
Cognac.. . . .	544	20,857	528	16,401
Honey.. . . .	56	1,477	34	795
Raw hides.. . . .	3,207	147,121	4,007	185,153
Turpentine.. . . .	2,016	22,761	2,410	36,837
Marble.. . . .	3,597	3,194	2,249	2,608
Iron ore.. . . .	133,405	13,383	70,059	6,453
Lead.. . . .	4,387	37,391	6,023	47,396
Chromium ore.. . . .	20,121	11,300	17,262	10,355
Calcined magnesite.. . . .	9,858	9,973	16,567	12,898
Emery.. . . .	13,172	19,420	16,050	18,658
Iron pyrites.. . . .	96,911	10,705	79,600	8,387
Must.. . . .	7,493	31,200	1,400	5,819
Soap.. . . .	1,357	15,862	1,325	17,070
Carpets.. . . .	47	8,715	56	13,436
Silk.. . . .	60	34,575	90	37,174
Cotton yarn.. . . .	31	1,054	55	1,554

V

Canada's Trade With Greece

Among Greece's sources of supply, Canada occupied in 1929 and 1928 respectively, according to Greek official statistics, eighth and fifth ranks. The imports from the Dominion amounted to 719,070,827 drachmae (\$9,587,611)

in 1929 as compared with 884,989,437 drachmae (\$11,799,859) in the preceding year, thus showing a decline of 165,918,610 drachmae (\$2,212,248). Exports from Greece to Canada were estimated at 1,950,390 drachmae (\$26,005) in 1929 and 5,272,780 drachmae (\$70,303) in 1928 a decrease of 3,322,390 drachmae (\$44,298). The trade balance in favour of Canada stood consequently at \$9,561,606 in 1929, as against \$11,729,556 in 1928. Imports from Canada for the five months ended May 31, 1930 and 1929, respectively totalled 86,143,000 drachmae (\$1,148,573) and 367,365,520 drachmae (\$4,898,206), and exports to Canada, 468,000 drachmae (\$6,240) and 814,000 drachmae (\$10,853). The following tables give the values, converted into Canadian dollars, of the principal Greek imports from and exports to Canada for 1929 and 1928:—

Principal Imports into Greece from Canada

Commodity	1929 \$	1928 \$
Herrings, tinned.. . . .	.....	333
Mackerel, tinned.. . . .	.....	2,333
Lobsters, tinned.. . . .	4,760	2,320
Other fish, tinned.. . . .	2,008	300
Codfish, dried.. . . .	380,321	500,677
Fish, salted, smoked, or in brine.. . . .	14,866	14,386
Wheat.. . . .	9,071,168	10,896,617
Wheat flour.. . . .	91,377	323,617
Skins, unwrought.. . . .	953	666
Timber.. . . .	2,160	26
Agricultural machinery.. . . .	13,166	38,394
Storage batteries.. . . .	533	522
Woodpulp.. . . .	3,173	4,066
Jute bags, new and second-hand.. . . .	2,663	8,022
Passenger motor vehicles .. . . .	.....	5,266
Total.. . . .	9,587,611	11,799,859

Exports from Greece to Canada

Currants.. . . .	7,706	63,200
Cigarettes.. . . .	503	192
Olives.. . . .	8,009	3,042
Spirituuous beverages.. . . .	3,522	1,069
Raw hides.. . . .	6,265	133
Magnesite.. . . .	....	2,667
Total.. . . .	26,005	70,303

In 1929, as compared with 1928, imports from the Dominion declined in dried codfish, wheat, wheat flour, and agricultural machinery. The decline in the imports into Greece from Canada in 1929, it will be seen, were mainly due to the decrease in purchases of wheat and flour.

GREEK OFFICIAL STATISTICS AND CANADA'S EXPORTS TO GREECE

It should be noted that in the figures credited to Canada those for Newfoundland are included, and as a result the returns under "codfish" must be credited to Newfoundland as it is Labrador codfish that is imported. On the other hand full credit is not given the imports from Canada: only the goods which were shipped direct from Canada are represented, Greek statistics not taking into account the country of origin—all goods coming to this market being credited to the country from which they arrive direct, or if they have been shipped in transit, to the country from which they are transhipped. Quite a considerable quantity of Canadian goods are shipped to this market via New York and other American ports, or London and Genoa, and some Canadian products sold through commission agents in London are being disposed of in the Greek market.

The adverse conditions at present prevailing in the Greek market, the reluctance of Canadian exporters to grant credit facilities to Greek merchants, and the lack of direct communications and absence of a trade agreement with Greece, are hindrances to the development of the already existing trade, and to the introduction of new lines. Canadian products, with the exception of wheat, flour, tinned fish and some agricultural machinery, are practically unknown in this field. In spite of the adverse factors which at present militate against the Dominion's trade in this country, it is believed that there is room for improvement in certain commodities, and the possibilities of the Greek market are being dealt with in detail in another section of this report, under the heading *Commodity Markets*.

VI

Centres of Trade

The three main centres in Greece for import trade are in order of importance, Athens-Piraeus, Salonica, and Patras, with Dedeagatch, Volo, Zante, Candia, Cavalla, Calamata, Catacolo, Corfu, Cephalonia, Laurium, Mitylene, Prevesa, Rethymno, Samos, Syra, Canea, Chios, and other ports, also effecting a certain amount of direct import trade. The Athens-Piraeus market serves more particularly Central Greece and the eastern coast of the Peloponnesus, and to a certain extent the whole of Greece and the islands; Macedonia, Thrace and Thessaly are catered to by Salonica for the major portion of their imports; and Patras is mainly the market for the western coast of the Peloponnesus.

The share in imports for each port during 1929 and 1928 was as follows:—

Port	1929 Metric Tons	1928 Metric Tons
Piraeus.. . . .	1,509,096	1,305,833
Dedeagatch.. . . .	29,189	24,680
Volo.. . . .	124,989	104,650
Zante.. . . .	3,735	3,425
Candia.. . . .	30,801	24,437
Salonica.. . . .	482,320	408,101
Cavalla.. . . .	28,431	28,453
Calamata.. . . .	72,259	58,260
Catacolo.. . . .	11,299	10,086
Corfu.. . . .	32,802	30,157
Cephalonia.. . . .	2,651	2,186
Laurium.. . . .	15,135	29,330
Mitylene.. . . .	29,746	20,486
Patras.. . . .	152,167	127,433
Prevesa.. . . .	7,206	6,709
Rethymno.. . . .	2,030	1,564
Samos.. . . .	6,339	6,303
Syra.. . . .	37,954	40,154
Canea.. . . .	16,051	9,456
Chios.. . . .	16,864	15,078
Other ports.. . . .	163,634	102,375
Total.. . . .	2,774,698	2,359,156

ATHENS-PIRAEUS

Athens-Piraeus, the population of which in round figures is 700,000, is the most important commercial as well as financial and industrial centre of Greece. Out of total imports amounting to 2,774,698 and 2,275,213 metric tons in 1929 and 1928 respectively, the Athens-Piraeus share stood at 1,509,096 and 1,305,833 metric tons, thus indicating that about three-fifths of Greece's total import trade is effected in this centre. In regard to finance, it may be said that the Stock Exchange is in the capital, as are the headquarters of all Greek banks and

financial establishments of importance. The Athens-Piraeus area also contains the largest proportion of industrial plants in Greece—chemical fertilizer, glass-ware, soap, silk, colophony, carpet, textile, flour milling, cotton and silk thread, hardware, box, and tile.

ATHENS-PIRAEUS IMPORT TRADE

According to official statistics, the commodities imported into Greece through the port of Piraeus amounted in 1929 and 1928 respectively to 1,574,870 and 1,366,666 metric tons. Of these quantities, 1,509,096 and 1,305,833 metric tons were destined for this country, whilst 65,744 and 60,833 metric tons represented the volume of goods in transit. Details regarding species and volume of the articles imported into Greece via Piraeus for consumption during the past two years are given hereafter:—

Greek Imports via Piraeus by Commodities (for Consumption)

Commodity	1929	1928
	In Metric Tons	
Live stock and fishery.. . . .	19,360	18,564
Agricultural products.. . . .	342,672	272,121
Colonial goods and vegetable products.. . . .	19,123	11,719
Oils and oil seeds.. . . .	25,219	18,376
Spirituos beverages.. . . .	2,340	1,917
Sugar and confectionery products.. . . .	24,350	22,046
Leather, leather goods and hides.. . . .	1,336	985
Forest products and articles in wood.. . . .	103,199	85,990
Minerals.. . . .	801,664	712,962
Metals and metal goods.. . . .	86,510	94,664
Scientific and musical instruments.. . . .	1,262	1,276
Pottery and glassware.. . . .	8,287	6,628
Industrial and pharmaceutical chemicals.. . . .	37,999	23,038
Perfumery and soap.. . . .	187	138
Colours and tanning materials.. . . .	3,884	3,027
Paper and paper goods.. . . .	13,666	15,205
Rubber and rubber goods.. . . .	469	541
Textiles.. . . .	11,290	11,481
Sporting goods and toys.. . . .	64	55
Hats.. . . .	63	65
Vehicles.. . . .	5,479	3,486
Ammunition and explosives.. . . .	50	128
Marine vessels.. . . .	367	1,220
Miscellaneous.. . . .	256	201
Total.. . . .	1,509,096	1,305,833

During 1929, Great Britain was the leading country for imports via Piraeus, followed by Russia, the United States, Roumania, Turkey, and Canada. It should be noted, however, that Greece's imports from the Dominion in 1929 via Piraeus showed a decrease of 36,737 metric tons as compared with the preceding year. Canada's products consisted principally of wheat and flour.

REGIONS SERVED BY THE ATHENS-PIRAEUS MARKET

It is difficult to draw a sharp line between the regions served by the Athens-Piraeus market and those importing direct or supplied through other ports. In a general way, however, it may be stated that Central Greece and the eastern coast of the Peloponnesus come almost exclusively under the Athens-Piraeus market, whilst the remainder of Greece and the islands deal on the one hand with foreign countries direct and to a certain extent through Athens-Piraeus, depending upon the nature of the goods imported, their country of origin, or the ports of call of steamers from abroad, or again the representative's organization. Goods imported in limited quantities into Greece, as well as goods necessitating a real technical knowledge on the part of the representative, are generally imported through Piraeus for later distribution throughout the country. Repre-

representatives having branch houses in the principal centres of Greece also prefer as a rule to receive all imports through Piraeus, whence they are shipped on Greek coastal vessels as and when they are required. It may be added that goods from certain countries come to Greece exclusively or mainly through Piraeus, the vessels on which these goods are shipped calling only at Piraeus or at the principal Greek ports, with the result that such goods, when needed in the islands or some other parts of Greece, have for the larger part to be brought from Piraeus. For instance, shipments from Marseilles and Alexandria to Greece are effected exclusively through Piraeus, whilst American steamers as a rule call only at Patras and Piraeus, and very irregularly at Salonica and other ports of a lesser importance. British vessels are coming regularly to Patras, Piraeus and Salonica, with some steamers also calling at other ports when necessary. On the other hand, Austrian, German and Czechoslovakian exports to this market via Trieste reach practically all Greek ports. This is also the case with Italian goods. But it remains that the larger share of Greek imports are received through Piraeus, which explains the fact that besides Central Greece and the eastern coast of the Peloponnesus, which are its immediate outlets, the Athens-Piraeus market also deals to some extent with the whole of Greece and the islands. However, on account of the heavy dues imposed in the port of Piraeus, occasioned by constant harbour labour disputes, a tendency on the part of Continental Greece and the islands to import direct is becoming more and more evident. But it is hoped that the coming establishment of a free zone and the consequent reduction in charges and formalities will help the Athens-Piraeus market to keep its supremacy.

Central Greece.—Central Greece, which is directly served by the Athens-Piraeus market, includes the peninsula and plain of Attica on the east, the plains of Thebes, Levadia and Kiphissos on the north, the valley of Amfissa to the south and the rich valley of Aheloos to the west. Attica, which constitutes the immediate hinterland of Athens-Piraeus, has extensive vineyards, mainly around Megara, Eleusis and Marathon: the characteristic product of the region is wine. Olives, olive oil, cereals, fruits and vegetables are also produced, but only on a small scale. Attica is considered as being the driest region in Greece, and it is on account of this that agricultural production, with the exception of vines, has never been developed to any great extent. The peninsula of Attica is also the most important mining region in Central Greece; it contains, particularly in the Laurium district, rich deposits of iron ore, lead, manganese, iron pyrites, etc. Megara, with a population of 10,400 inhabitants, and Eleusis, with 4,300, are the principal towns in the Athens-Piraeus hinterland. In the plains of Thebes, Levadia and Kiphissos, wheat, cotton, vines, tobacco and fruits are grown. The town of Thebes, situated on the Athens-Salonica railway line and facing the wheat-producing plain of the same name, having a population of 7,100 inhabitants, together with Levadia, whose population is placed at 12,500 inhabitants, are the principal towns in this area. The long and narrow valley of Amfissa produces excellent olives. Amfissa, the main town, whose population is 5,300 inhabitants, is linked with the port of Itea by a carriage road. The valley of Aheloos, which is traversed by a local railway line, is the most productive region in Central Greece; tobacco and cereals are cultivated on a comparatively large scale and meadows in which numerous flocks of goats and sheep graze are abundant. Agrinion, with a population of 14,500 inhabitants, is the principal town and an important centre for tobacco manipulation and preparation. Another town of interest in this area is, to the south, Mesologhion, the principal industry of which is fishing. There are regular services of small coastal vessels between Piraeus and the valleys of Amfissa and Aheloos, whilst the other parts of Central Greece are linked with the Athens-Piraeus market by

rail or motor roads. Threshers, reapers, ploughs, machinery, machine tools, wheat, flour, provisions, and general merchandise are in fair demand in this part of Greece.

The Peloponnesus.—With the exception of the western coast, which imports its requirements mostly through Patras, the Peloponnesus deals with the Athens-Piræus market, only small quantities of goods being imported direct, and the trade of Corinth being equally divided between Patras and Athens. In other words, the regions in the Peloponnesus which look to Athens-Piræus for their supplies are the northeastern coastal strip, the plain of Argos, the plateaus of Tripolis and Megalopolis and the valley of Sparta. The northeastern coastal strip extends from Corinth (10,000 inhabitants), comprising the towns of Aeghion (11,000), Kiaton and Acrata (1,000 each), and Xylocastron (2,300), all of which are situated on the Piræus-Athens-Patras railway line. This region produces large quantities of currants of a high quality, grapes and olives. Some deposits of lignite, but of a mediocre quality, are also to be found in this district. In the fertile plain of Argos, the cultivation of currants gives way to that of grapes, vegetables, maize and tobacco. The products of the region as well as imports are concentrated in the town of Argos, whose population is placed at 10,500 inhabitants. Imports are being shipped either by railway direct from the Athens-Piræus market or by steamer from Piræus through the port of Nauplia (7,000 inhabitants) to which Argos is linked by a fairly good road. The plateau of Tripolis is very fertile. The principal products grown are cereals, vegetables, grapes and currants, potatoes and fruits. Situated on the Athens-Calamata railway line, Tripolis (14,400 inhabitants) is the principal commercial town of this area. Its requirements are obtained in the Athens-Piræus market, whence they come by rail, and the neighbouring towns get their supplies from this source. The Sparta valley is densely covered with olive and fruit trees. The principal town of this region, Sparta (5,700 inhabitants), gets its supplies either from Tripolis, with which it is linked by a fairly good macadamized road, or from the port of Gythion, which is nearer, but only to a small extent, the road between this port and Sparta being almost impassable. Finally, the Megalopolis plateau produces grapes, fruit and animal products. Megalopolis (2,400 inhabitants) is the largest town in this area. Imported goods are received from Piræus by rail through the above town.

The means of communication between Athens-Piræus and these regions are mostly by rail and by sea. The goods are shipped to the larger and more central towns, from whence they are distributed to the smaller towns, the larger share of the goods being transported by means of mules, owing to roads being either in a very bad state or non-existent.

The population of Athens-Piræus, Central Greece and eastern regions of the Peloponnesus combined is placed at over 2,000,000 inhabitants, but the importance of Athens-Piræus resides in the fact that, besides these regions in the immediate vicinity, trade is being effected with the whole of Greece and the islands, as has already been stated in this report. The demand in these regions is mainly for wheat, flour, provisions, timber, agricultural machinery and tools, manufactured goods, etc.

Epirus.—The essentially mountainous configuration of the province of Epirus does not allow any extensive cultivation, but cattle-raising is somewhat more developed. The products grown are barley, grapes, and olives. The economic importance of this territory is insignificant. Jannina (20,500 inhabitants) is the principal town, and Preveza (8,600 inhabitants) is the port through which trade is conducted. Import business is to a limited extent carried on direct with foreign countries, but the larger share of imported goods comes through Patras and Piræus, whence they are transhipped on small coastal vessels.

Cyclades Islands.—The principal islands of this group are Kea, Kythnos, Syra, Serifo, Sifnos, Milos, Andros, Tinos, Mykonos, Naxos. These islands have a generally arid soil, with the result that agricultural production is confined to limited quantities of cereals, vegetables, potatoes (Naxos), tobacco and excellent grapes (Serifo), fruits (Andros), olives, olive oil and good-quality wine (Naxos). The actual wealth of these islands consists of minerals. There are deposits of iron and manganese in Kythnos, iron, zinc, iron pyrites, gypsum and gold, in Serifo, iron, zinc, lead, tale and gold, in Sifnos; Naxos is famous for its emery mines, which are under the control of the Government; Milos is rich in lead and millstones. Marble in important quantities is also cut in these islands. With the exception, however, of the iron mines of Serifo and the emery mines of Naxos, mining is not of great economic importance.

As for import trade, it can be said that Syra deals to quite a large extent direct with foreign countries, whilst the other islands obtain their requirements either from Athens-Piræus or from Syra. A few years after Greece had obtained her independence, the port of Syra enjoyed a substantial trade, which, however, was gradually lost to Piræus with the development of the latter port. But as a result of the heavy charges imposed in the port of Piræus, a portion of the trade to the Cyclades islands has in the past few years been regained by Syra, which, being on the route to Smyrna and Alexandria, has good steamship connections. Wheat, flour, timber and manufactured goods form the bulk of the Cyclades islands' import trade.

Sporades Islands.—Skyros, Skopelos and Skiathos are the most important islands in the Sporades group. The soil of these islands is generally rocky, but fertile where level. The main products are olive oil, wine, fruits and cheese. A certain amount of fishing is also carried on, and some coloured marble is produced. These islands, for the larger part of their requirements of imported goods, deal with the Athens-Piræus market. Wheat, flour, timber, cement and general merchandise compose the imports of the Sporades islands.

Crete.—The population of Crete numbers 386,427 inhabitants, of which 500 are foreigners. The people of this island live rather frugally, but everybody works, and there seems to be more prosperity in this area than anywhere else in Greece. The capital of the island is Canea (26,000 inhabitants), but the most important town as regards commerce and population is Candia (33,400 inhabitants). Canea and Candia are the two ports through which imported goods are received, Candia taking as its share about 30,000 metric tons annually, whilst approximately 16,000 metric tons enter Crete through Canea. Imports include wheat, flour, sugar, coffee, timber, cement, textiles, leather, kerosene, sulphur, automobiles, tractors, agricultural machinery, and manufactured goods. Wheat and flour, mostly from the United States and Canada, are imported through Piræus; of the other products received from abroad only a small portion is brought through Piræus, the larger share being received direct. Import business is carried on through foreign manufacturers' agents, wholesalers and commission agents in Candia or Canea, foreign firms seeming to give preference to Candia. Firms with a good standing can obtain credit facilities, whilst second-rate concerns have to pay either cash against documents or cash with order, depending on the commodity. Italy, Czechoslovakia, India, Egypt, Yugoslavia, Germany, Great Britain, France, Belgium, Roumania, Holland and the United States have their agents in Crete. Vessels from different countries call frequently at Candia or Canea.

With the exception of wheat and flour, imported through the port of Piræus, Canadian produce is not to be met with in the market of Crete.

The import trade in the island of Crete depends entirely upon the crops. This year the crop outlook is very good, and as a consequence it is estimated

that there will be an increase in imports as compared with last year. The soil is very fertile, and favoured by the fine Mediterranean climate the cultivation of a great variety of products is possible. Olives, fruits, tobacco, currants, grapes, sultanas, wine, and olive oil are produced in comparatively large quantities. Sheep, goats and cattle are raised on quite a large scale, and dairying is developed in comparison with other parts of Greece. Exports generally exceed imports.

Aegean Islands.—The principal Greek islands in the Aegean are Mitylene, Chios and Samos. Mainly agricultural, their principal products are cereals (wheat, barley, and meslin), vegetables, cotton, tobacco, and grapes. Cattle and sheep are also raised. There is a good market in these islands for agricultural machinery and tools. Imports are effected for the larger part through Piraeus.

Ionian Islands.—Situated along the western coast of Continental Greece and of the Peloponnesus, the principal Ionian islands are Corfu, Lefkas, Cephalonia and Zanate. These islands, generally fertile, are covered with fruit and olive trees and vines. Except Corfu, which is a market of its own, all the other Ionian islands receive their imported goods either direct from abroad or from Patras and Piraeus, Patras seeming to have the larger share of the import trade of the Ionian Islands. Imports consist principally of wheat, flour, textiles, and provisions.

PROVINCIAL TOWNS

With the exception of a few German travellers, foreign representatives do not as a rule visit the provincial towns in Greece, contenting themselves by calling at such centres as Athens-Piraeus, Salonica, Patras, Corfu, and some of the more important ports in the islands. The hinterland of the Athens-Piraeus market is not an exception to the general custom, but merchants in this centre, besides having agents in the small provincial towns, send their own travellers at periodical intervals to canvass the trade. Nevertheless, the old method still widely prevails—that is, provincial merchants and retailers to a large extent make their own purchases of imported goods at the occasion of regular visits to Athen-Piraeus. However, a special feature about the Athens Piraeus market is that for certain lines merchants in this centre have agents not only in the hinterland, but also in the more important agglomerations of Greece and the islands, these agents having in turn representatives in the small provincial towns. This is due to the fact that goods from certain countries are received only through Piraeus or that some foreign firms appoint representatives only in the Athens-Piraeus market.

PIRAEUS TRANSIT TRADE

Goods in transit in the port of Piraeus amounted to 65,744 and 60,833 metric tons for 1929 and 1928 respectively. These goods had as their final destination the Black Sea States, Turkey, Cyprus and the Dodecanese. The transit trade in this port is not considerable, due undoubtedly to heavy charges and intricate customs formalities, but it is hoped that it will receive a great impetus when the free zone is in operation—that is, in about a year's time—as better facilities will be afforded for import and transit trade as well as for handling, and storage fees will be considerably reduced. The intention of the Government in establishing a free zone in the Port of Piraeus is to obtain the transit trade that Salonica, owing to its geographical position, cannot obtain, and that which Constantinople has lost through lack of accommodation—that is, the transit trade with Russia, Bulgaria, Roumania, Turkey in Asia, Cyprus

and a portion of the North African coast. Great hopes are held to attract goods from the Far East and South America, which will ultimately be re-exported all over the Levant.

TRADE ROUTES

On account of the fact that no regular steamer service exists between Canadian and Greek ports, Dominion produce arriving in Greece, except for wheat, which is brought direct by especially chartered steamers, comes mainly via Liverpool, London or New York, at which ports transshipment is effected. It goes without saying that this is a very unsatisfactory situation, but the nature of Canada's trade with Greece and neighbouring countries would hardly warrant at the present time the establishment of a regular steamer service, unless, of course, a scheme could be arranged in virtue of which steamers plying between Canadian ports and ports in the Eastern Mediterranean would on their way stop at Piraeus. It is beyond doubt that if steamers coming from Canada called at Greek ports at regular intervals, coupled with most-favoured-nation rates of duty on the Dominion's commodities, Canadian trade in this part of the world would receive, when conditions have improved, a great impetus.

Great Britain, Belgium, Holland, Germany, France, Italy, Roumania, Bulgaria, Russia, Egypt, the Northern Continental countries, and the United States, maintain regular steamship services to Piraeus.

Various Greek companies maintain regular services between the Piraeus and Alexandria, Port Said, Marseilles and Brindisi. The steamer services between Greek ports are confined to Greek vessels.

According to the port's statistics for 1929, the total number of steamers which called at Piraeus was 7,975 (6,545,917 tons), the most important registrations being: Greek, 5,859 (2,402,876 tons); Italian, 731 (1,519,441); British, 441 (973,016); French, 154 (497,092); German, 147 (248,721); American, 82 (186,345); Russian, 78 (110,298); and Dutch, 70 (103,008 tons). The total number of sailing vessels was 5,828 (163,212 tons), of which 5,734 (156,622 tons) were of Greek registration.

TRADING WITH MACEDONIA, THRACE AND THESSALY

Bounded on the east by Turkey, on the north and west by Bulgaria, Yugoslavia and Albania, on the southwest by the province of Thessaly, which until 1912 was the Turkish frontier, Macedonia and Thrace constitute a portion of what is known as New Greece. The total population of Macedonia, Thrace and Thessaly, in which the land has been divided up by the Government into small holdings, exceeds two millions inhabitants. The principal centre for imported goods is Salonica.

EASTERN MACEDONIA AND THRACE

Eastern Macedonia and Thrace are entirely agricultural, with the exception of mining on a small scale in some districts. The principal crop is tobacco, wheat, barley and maize being cultivated only to a small extent. There is also a certain amount of sheep breeding.

The population of Eastern Macedonia and Thrace has more than tripled since the exchange of Greeks and Turks (1922-23) and now numbers approximately one million inhabitants, close on 75 per cent of whom are refugees from Asia Minor, the remainder being composed of old Macedonians, with about 95,000 Turks in Thrace. From a thinly populated territory with peoples of oriental habits, this area has therefore become a more densely populated terri-

town with peoples more or less Europeanized, thus creating for manufactured goods an important and entirely new market which will continue to grow. The refugees are more enterprising and industrious than the old Macedonians, and in this part of Greece a steady development worthy of the attention of exporters abroad is being observed. Towns of from 35,000 to 65,000 inhabitants have sprung up, and villages with modern dwellings have been built throughout these provinces in the last few years; electric light has been installed in every town and in most of the villages; drainage and drinking water works have been executed; roads are being built at the Government's expense by private contractors; large areas upon which cereals will shortly be grown are being reclaimed; finally, much virgin soil is being tilled for the first time and an increasingly large area is being put under cultivation.

The principal towns in Eastern Macedonia and Thrace are Serres, Drama, Xanthi and Komotini, with populations ranging from 35,000 to 40,000 inhabitants, and the port towns of Cavalla and Dedeağatchi, with 65,000 and 15,000 inhabitants respectively. All these towns are on the main railway line between Europe and Constantinople, except Cavalla, which has no railway communication. Either roads or tracks connect up the various towns and villages, and an intense and regular motor traffic both in passengers and goods is carried on during the dry months of the year—that is, from March to November. For imported commodities Salonica is the market which serves the towns and villages in Eastern Macedonia and Thrace, as well as those in Western Macedonia and Northern Thessaly, Southern Thessaly being supplied from the Athens and Piræus markets.

WESTERN MACEDONIA AND THESSALY

Western Macedonia is both agricultural and industrial. The main crops are tobacco, cotton, maize, cereals, and silk cocoons; sheep and goats are also reared. The industrial concerns consist of flour mills, hemp, rope and twine factory, cotton, wool and silk spinning and weaving mills. In the Thessalian plain the principal crops are cereals, tobacco and cotton. Large areas of lands are being brought annually under cultivation and extensions are being made in the manufacturing industries in this part of Greece.

The population of Western Macedonia and Thessaly exceeds one million inhabitants, amongst whom are a good sprinkling of refugees who in many parts have introduced the cultivation of tobacco. The principal towns in Western Macedonia are Edessa, Florina, Nacussa, Verria and Kozani, whose populations of from 11,000 to 15,000 inhabitants have not shown the striking increase of the towns in Eastern Macedonia and Thrace. The largest towns in Thessaly are Larissa (35,000 inhabitants), the port of Volo (50,000), Lamia (18,000), and Trikala. In late years a fair increase in population has taken place in these towns. Most of the towns in Western Macedonia and Thessaly are connected by the State or by privately owned railways. A new railway is being built by Belgian contractors connecting up the Epirus to existing lines, and work on new roads has also begun. The fertile plain of Thessaly is bound to develop rapidly during the next few years, and the towns of Larissa, Trikala and Lamia will become comparatively important centres of supplies. Larissa is only three and one-half hours from Salonica, where, rather than Athens, many of its requirements are bought, the latter market being more distant, dearer and more difficult to deal with. The port of Volo buys from Salonica, Piræus and Athens, and trades also to a relatively small extent direct with foreign countries. Volo is connected by a privately owned railway with several towns in Thessaly, but its trade with them is seriously hampered by high rail freights and the complete absence of roads connecting it with the interior.

PROVINCIAL TOWNS LITTLE KNOWN

Surprisingly little is known about the provincial towns in Macedonia, Thrace and Thessaly, none of them being visited by foreign representatives, except by a few German travellers, nor even by the Salonica merchants who have not considered personal acquaintance necessary as most of the purchasing of imported goods is done during periodical visits made to Salonica by the provincial merchants and retailers. However, the rapid increase in motor passenger services and the improvement in and construction of roads will soon bring about much closer contact. In the towns of Macedonia and Thrace there are practically no old-established merchants, nor any commission agents, but as these towns grow direct trade through commission agents in Salonica or on the spot is bound to come, particularly if direct steamship communication is established as a result of port improvements which it is proposed to carry out at Cavalla and elsewhere, and when the size of individual orders is large enough to warrant direct shipment. This is likely to take place at no distant date.

PARTICULARS OF PROVINCIAL TOWNS

Komotini.—The capital of Thrace and seat of the Governor-General and Court of Assizes, Komotini has a population which has grown from 3,000 in 1919 to 35,000, comprising 17,000 Greeks, 15,000 Turks, and 1,500 each of Armenians and Jews. Unlike the remainder of Thrace and the province of Macedonia where tobacco predominates, the area in which this town is situated is devoted to general agriculture, the products being wheat, barley, maize, sesame, tobacco, almonds, dried fruit, silk cocoons, and wool. Wheat is the staple crop. Business conditions generally are good and the standard of commercial morality is high. Local purchases are made verbally without any written contract, drafts being given only in payment of imported goods. The market is not visited by agents, and local merchants are obliged to go periodically to Salonica to make their purchases. Goods are received either by train direct from Salonica or by boat from Salonica to Dedeağatch and thence by train. Italian goods only are shipped to Dedeağatch from their country of origin, thereby gaining an advantage. There is in Komotini a fair demand for the following: Threshers, reapers, ploughs, tractors, maize shellers, wire netting and barbed wire, and binder twine, these being at present supplied by German and American manufacturers. The local agricultural co-operative union commenced working only two years ago and so far has not placed many orders. The machinery now in use is owned by local farmers, mostly Turks, but none of them are wealthy, and owing to the sub-division of land into small holdings future purchases will be made by the co-operative societies and unions. Passenger cars ply between Komotini and Xanthi, but the demand for these is small. Transport of produce and other merchandise is mostly done by bullock carts, and very few commercial motor vehicles are in use. As for general merchandise, it may be stated that owing to the large proportion of native population there is a mixed trade to meet both European and Eastern tastes.

Xanthi.—The town of Xanthi is situated on the Salonica-Constantinople line, between Drama and Komotini, and will shortly be connected by a new road now in course of construction to the port of Cavalla forty miles to the south. The population of Xanthi has trebled during the last few years and is now just under 40,000 inhabitants, one-half of whom are refugees. The town lies in the centre of an important tobacco-growing district; the area sown to cereals is very limited. Xanthi draws its supplies from Salonica, most of them being shipped by sea to Dedeağatch and then on by train, but Cavalla hopes to take this transit trade when the new road is completed. The market for agricultural machinery is very small; only four or five Fordson tractors are at

work in the district together with a few threshers. There are no industries in Xanthi, except a flour mill which purchases its requirements in wheat from Eastern Thrace, and a cigarette and ice factory.

Cavalla.—This is the principal port for exporting tobacco from Eastern Macedonia and Thrace. Its population now numbers approximately 65,000, as compared with 12,000 in 1914. Cavalla has the appearance of an old Turkish town except in those parts where a few large modern five- to six-storey buildings have been erected by American, Austrian, Italian, and other exporting companies for the storage and handling of tobacco. The town is over-populated by refugees who, owing to the introduction of machinery for tobacco manipulation, find it more and more difficult to obtain employment. An era of greater prosperity is, however, promised when the Monk-Ulen contract for the reclamation of land in Eastern Macedonia has been completed, which will be in five or six years, and when the road now under construction to Xanthi is open, as it is hoped that this town and Komotini will buy many of their supplies through Cavalla instead of bringing them by rail from Salonica and Dedeagatch.

The port at present is an open roadstead, but a contract has been given to a Greek concern for port works which are to be commenced at an early date. Steamers call at this port for tobacco shipments, but the only regular foreign service is that of the Lloyd-Trestino which brings general cargo for Cavalla and the hinterland. However, regular services are assured by Greek coastal vessels. The demand in the Cavalla market is for general merchandise.

Drama.—The town of Drama, which lies in the centre of the largest tobacco-producing area of Greece, is situated about 100 miles northeast of Salonica, on the Salonica-Constantinople railway line, and about 23 miles from the port of Cavalla to which it is connected only by a road in a bad state of repair. Its population is estimated at 38,000, nine-tenths of whom are refugees. Owing to its situation this town is, after Salonica, the largest buyer in Northern Greece. Its supplies are received from Salonica, Cavalla and Serres. There is a good demand for all classes of merchandise. Motor lorries are used for transporting all goods purchased from Cavalla and for tobacco exported, and when the roads now under construction are completed business generally will increase. Little, if any, direct buying is done as yet, and the town has so far never been visited by foreign representatives with the exception of a few German travellers. Trade is stagnant owing to tobacco over-production and to most of the tobacco buyers holding out for lower prices. There is not much hope for improvement in the situation till next year.

Serres.—Since the influx of refugees the population of Serres, which now numbers 35,000, has more than trebled. Almost entirely destroyed during the war, this town has now been rebuilt with modern houses. Serres is the centre of supply for a large agricultural district growing principally tobacco and some cereals, and seems to be promising of prosperity for some years to come. There is a demand for manufactured goods such as textiles, hardware, electrical sundries, motor cars and lorries, agricultural machinery, etc. This town is connected by railway to Salonica and Drama, and although the road connection is bad there is a continual stream of motor cars and lorries taking passengers and merchandise to and from Salonica, Drama, and the surrounding villages.

Florina is situated 100 miles northwest of Salonica, near the Yugoslav and Albanian border. The town is of little commercial importance, as it serves only as the town of transit for goods sold from Salonica to Southern Albania, these goods arriving by train and being subsequently forwarded by motor lorry to Koritsa. The development of the surrounding area has been retarded by

the delay in the settlement regarding boundaries between Greece and Jugoslavia, a decision having been only recently reached. Most of the town has been rebuilt by Canadian and American Greeks who make use of Florina as a summer health resort owing to its elevation of 750 metres above sea-level. The two thousand Turkish repatriated families were recently replaced by only five hundred refugees who have introduced the cultivation of tobacco, already ranking as the first crop.

Edessa.—About fifty miles west of Salonica, perched on the side of a hill one thousand feet above sea-level and overlooking a large, well-irrigated and fertile plain, Edessa—still known by its old name of Vodena—is a flourishing industrial town of 20,000 inhabitants. A river runs along the plateau behind Edessa, traverses the town in several directions and falls in a series of cascades into the plain below. The river and the falls are the origin of this prosperous district; all kinds of fruit, cereals and vegetables are cultivated, and the power from the water is used for lighting and industrial purposes. There are in Edessa two cotton spinning and weaving mills, the larger of which produces 400 packets of ten pounds each of yarn and 6,000 yards of grey sheeting per day, one hemp and twine factory with a capacity of 1,000 kilos each of twine and cord per day, several small silk spinning factories, silk being spun from the cocoons produced in the district; and finally, a woollen-spinning factory to be equipped with German machinery in course of construction. The principal crops of this area are peppers and shallots, of which latter about 1,500 tons are shipped annually to Germany and Great Britain. Most of the produce from this district and imports from Salonica are conveyed by motor lorry. Local merchants make frequent visits to Salonica, which supplies all their requirements.

Naoussa, Edessa and Verria, all of which have abundant water and lie close to one another, form one of the most important and flourishing industrial areas in Greece. In Naoussa there are two companies of consequence manufacturing woollen and cotton yarns, woollen cloth for women's wear, cotton sheeting, and men's suitings. This town is not otherwise commercially important, and its population (13,000) has not increased in the past few years.

Verria is 50 miles to the east of Salonica, and has a population of 18,000. The town is the centre of an important agricultural zone which produced, in 1928, 2,300,000 pounds of tobacco and approximately the same quantity of cotton, together with onions, maize, silk cocoons, butter and cheese, and possesses about 120,000 head of sheep and goats. A small market is to be found in Verria for agricultural machinery, especially tractors and threshers; a few tractors (Fordson and Munktel) as well as a few threshers (Case and Lanz) are already at work in the district. Verria has a cotton-spinning mill employing 200 hands, and some small silk-spinning factories. The company owning the cotton mill utilizes a waterfall adjoining their property not only for working the mill but also for lighting Verria and several villages within a radius of 50 kilometres. The Verria falls are said to represent 20,000 h.p., and the milling company have an ambitious program under consideration for supplying light and power to Salonica. Another fact worthy of attention is that the "Société Commerciale de Belgique" is building a railway between Verria and Kalambaka which when completed will link up an important agricultural centre.

Kozani, which has no railway, is situated about 90 miles southwest of Salonica, at 2,000 feet above sea-level, and has a population of some 13,000 inhabitants. This town receives its supplies from Salonica whence they are transported by train to Sorovitch, 26 miles distant, and thence by motor lorry, except in the summer months when they are shipped direct from Salonica by

road in motor lorries owned by local contractors. Kozani supplies a surrounding population of about 100,000 inhabitants, and does a flourishing business in all classes of general merchandise. There is also a growing market for agricultural machinery such as tractors, threshers and cream separators. Considerable development is expected during the next few years. A road, which will link up an important agricultural area, is in course of construction between Kozani and Jannina, in the Epirus, via Metzovo and Litsista.

Larissa.—The town of Larissa, with 35,000 inhabitants, lies very advantageously near the centre of the Thessalian plains, on the main railway line between Athens and Salonica, about seven hours from the former and only three and one-half hours from the latter. A narrow-gauge railway links also this town to the port of Volo. Larissa has grown considerably in the last few years and promises to become a town of consequence as this agricultural area develops. The principal products of the region are wheat, barley, oats, tobacco and silk cocoons. There are seven small weaving factories employing about 500 hands, and a flour mill producing forty tons per day. Larissa supplies a surrounding population of about 300,000 inhabitants. During the past year there has been a notable increase in the sale of agricultural machinery—that is, tractors, threshers and binders—and further development is anticipated during the next few years. Trikala, whose requirements of agricultural machinery are of consequence, buys from Larissa. From the point of view of the sale of agricultural machinery and accessories, Larissa seems to promise a sufficiently large market with the surrounding district to be considered as a separate and independent unit. Goods could be imported through the port of Volo and would require to be displayed in Volo, Larissa and Trikala. The Greek Government are about to give a contract for the reclamation of large areas in Thessaly which when completed will bring much more land under cultivation, and in consequence will further improve the prospects for the sale of agricultural machinery and all commodities.

Larissa was until 1912 the last town on the Turkish frontier, which accounts for the fact that there is no communication by road with the south until Pharsala, 20 miles distant, is reached, but a new road is in course of construction and should be completed at an early date.

Volo, the only port in Thessaly, is situated half-way between Athens and Salonica, and a narrow-gauge railway connects it with several towns in the interior. Its population—which has shown considerable increase during the last few years—is placed at 48,000 inhabitants, but the further development of the town is seriously threatened by lack of road communication with the interior and by the high freights charged on goods shipped by the railway, and it is likely that Larissa, more favourably situated, will take its place as the most important business centre of Thessaly. The Lloyd Triestino and Johnson Line make Volo a regular port of call, and the Byron Line send their ships to this port from time to time, whilst Greek coastal vessels stop there regularly. A certain amount of direct trading with foreign countries is done by Volo in all kinds of manufactured goods, many of which go into the interior. The surrounding district is agricultural, and the principal crops are tobacco, apples, and olives. Large quantities of minerals also are said to exist in the interior, and regular shipments of 800 tons per month of chrome ore are made in British bottoms to the United States.

There are several important manufacturing industries in Volo, amongst which may be cited two flour mills, several woollen and cotton spinning and weaving factories, and two iron foundries manufacturing agricultural sundries such as ploughs, ploughshares, hay reapers, mowers, oil and wine presses, nails, and foundry articles.

Lamia is on the main railway line 110 miles north of Athens, and has a population of 18,000. The surrounding district is entirely agricultural, and the town, the source of supply for a population of from 170,000 to 200,000, buys all its requirements from the Athens and Piraeus markets. The chief articles of produce in this zone are cereals, tobacco and cotton, cattle-breeding being also carried on extensively. *Lamia* offers a good market for tractors, threshers, reapers, binders, and general merchandise. This town, which has made great progress during the last few years, is still enjoying great prosperity.

PATRAS

Patras has a population of 80,000 inhabitants, 20,000 of which are refugees from Asia Minor. The city is, after Athens-Piraeus and Salonica, the third largest in Greece. It is situated in the northwest corner of the Peloponnesus, at the entrance of the Gulf of Corinth, ten hours by sea through the Corinth Canal and seven hours by rail from Athens-Piraeus. The Peloponnesus railway links Patras to Athens-Piraeus, and also to several small towns on the west side of the peninsula. This is an independent market doing direct trade with all foreign countries with whom it is connected by regular steamship services. Patras serves several towns on the west of the Peloponnesus, the principal of which are Calamata and Pyrgos, as well as it furnishes an appreciable portion of the requirements of the Ionian Islands and Corinth, together with a certain share of the Jannina trade through Preveza. The town is most noted for its shipments of currants, but in addition it has several manufacturing industries of some importance, which include flour, cotton and woollen mills, hosiery, box shooks, staves, and carpet factories, wine distilleries, etc. The outlook for general trade in this region from the standpoint of imported goods such as textiles, hardware, motor vehicles, agricultural machinery, fertilizers, building materials, leather, provisions, and general merchandise cannot be considered good, as not only were last year's crops upon which the bulk of the population depends below average, but prices are also from 15 to 20 per cent below their normal level, and the crop outlook for this year is not any too promising owing to heavy rains and hailstorms which have recently damaged nearly all the crops.

IMPORTS INTO PATRAS

According to the Greek official statistics, imports into Patras amounted in 1929 and 1928 respectively to 152,167 and 127,433 metric tons. The principal commodities were:—

Commodity	1929 In Metric Tons	1928
Live stock and fishery.. . . .	3,175	4,307
Agricultural products.. . . .	54,019	50,497
Colonial goods and vegetable products	630	497
Oils and oil seeds.. . . .	14,660	4,245
Spirituos beverages.. . . .	757	727
Sugar and confectionery products.. . . .	3,226	3,134
Leather, leather goods and hides.. . . .	60	44
Forest products and articles in wood.. . . .	26,365	25,622
Minerals.. . . .	29,507	22,471
Metals and metal goods.. . . .	11,868	9,655
Scientific and musical instruments.. . . .	75	52
Pottery and glassware.. . . .	957	343
Industrial and pharmaceutical chemicals.. . . .	3,684	2,813
Colours and tanning materials.. . . .	548	483
Paper and paper goods.. . . .	473	549
Rubber and rubber goods.. . . .	30	33
Textiles.. . . .	1,722	1,742
Sporting goods and toys.. . . .	8	4
Hats.. . . .	19	22
Vehicles.. . . .	330	145

STEAMSHIP LINES

With the exception of the steamers of the French lines, practically all steamers coming to Greece call at Patras.

REPRESENTATION

Canadian exporters making arrangements for representation in this country should consider the advisability of appointing agents not only in Athens-Piraeus and Salonica but also in Patras, which is a distinct market dealing direct with foreign countries.

CALAMATA

Calamata, with a population of 30,000 inhabitants, is the principal town in the Peloponnesus served by the Patras market. Although a seaport, Calamata, except for dried codfish, buys all its requirements from Patras.

CORFU

Corfu is situated opposite the extreme northwest of Greece, is about twenty-four hours from Piraeus, and has a population of 106,000 inhabitants. The prosperity of the island depends largely upon the olive crop, which for some years past has been below average. There are a few small local industries established in Corfu, which include a rope and sack factory, printing works—the largest establishment of its kind in Greece—and several soap and candle factories. Imports consist principally of textiles, hardware, earthenware, machinery and accessories, dried and salted fish, uppers for the manufacturing of shoes, commercial and passenger motor vehicles, etc. Owing to the proximity of this island to Italy and to the frequent steamship connections with this country, most of the trade goes to Italian merchants. The Corfu market serves the island of this name and a few minor agglomerations on the northwestern coast of Continental Greece.

VII

Conditions and Prospects in the Athens-Piraeus Area

Owing to the slack summer season, and more particularly to the shortage of circulating capital, the Athens-Piraeus market has been, generally speaking, in a stagnant condition, not much business passing in any line. The wholesale merchants are weighed down by an accumulation of old taxation, which they have been unable to pay off. It must be added that the Government has recently abolished the private bonded stores and is forcing the merchants to pay the full dues on the stocks. The amounts involved are estimated at many millions of drachmae. Stocks in most commodities are fairly low, and it is hoped that there will soon be some revival of activity.

There is an evident restriction of capital in circulation, and commercial obligations are not always promptly met at maturity even by the soundest concerns. Owing to the state of the market, bankers are satisfied if about 25 per cent of the bills are paid at maturity, the remainder being renewed and gradually paid up, unless they concern firms which are being driven out of the market, in which case they are protested and remain unpaid pending liquidation of the business of the debtors.

STANDARD OF LIVING

The population of Greece may be divided into the upper, middle, and lower classes. Wealthy rentiers, shipowners, and bankers belong to the first-named,

and their standard of living in some ways is high. They generally own luxurious houses in town, and villas in Kiphissia or some other resorts in Greece, where they spend a portion of the summer prior to proceeding to some of the famous European resorts for the remainder of the season. The bourgeoisie may be said to comprise, on the one hand, professional men and merchants, and on the other, public or private employees whose incomes are comparatively low. The professional men usually own their houses, and generally go to the islands of Greece for the summer months. The standard of living amongst employees is lower still, owing to their income being limited. They usually live in rented quarters, making the two ends meet with great difficulty, unless through marriage they have succeeded in obtaining a dowry, according to a custom which is still widely prevalent in Greece. Finally, as regards the labouring classes, the standard of living has recently improved. A few years ago the average labourer would eat meat once a week (say on Sunday), and lodge in very bad quarters with none of the modern comforts. At the present time the workman consumes more meat, but still lives in small and poor houses or huts. It must be added, however, that as concerns refugees, as a result of the special attention given to them by the Refugee Settlement Commission, they have been housed in relatively good and comfortable quarters. The Greek market is, generally speaking, a price market, quality for the larger part of the trade being only of a secondary importance.

REPRESENTATION

In the Athens-Piraeus market import trade in almost its entirety is effected through commission agents, the number of whom is disproportionately high; very little business is done with wholesalers direct. Direct trade is generally considered to involve difficulties and risk, besides entailing a heavy correspondence which the wholesalers are not as a rule prepared to undertake as they do not care to keep adequate staffs. A distinction must be made between the old-established organizations, which have means and sound business knowledge, and the small concerns which sprang up after the Great War and the influx of the refugees. The standard of the commercial morality of the former is, generally speaking, quite high, but they represent only a comparatively small proportion of the firms engaged in import trade. Another typical feature about agents in this centre is that they deal in a number of lines which are often widely diversified. Great caution must therefore be exercised in the choice of a representative in the Athens-Piraeus market, special attention being given to both reliability and business knowledge.

Information regarding the financial status, etc., of concerns in Greece may always be obtained on application at the Canadian Trade Commissioner's office in Athens.

METHODS OF PAYMENT

Methods of payment prevailing in the Athens-Piraeus market vary according to the nature of the goods, the country of origin, and the degree of reliability of the firm with which business is transacted. Terms extend from confirmed irrevocable credits opened by importers in favour of exporters in a bank at port of shipment for a limited number of commodities and with specific countries, cash against documents on presentation or after the arrival of the goods, down to short-term credits in the form of 30, 60, 90, and 120 days' acceptances upon delivery of documents to importers, and credits of six to twelve months or more. With special reference to the method of payment by cash against documents, it was the practice in the past for the importer to remit a certain percentage of the amount of the order, usually one-third, with the order, the balance being settled by cash against delivery of shipping documents. The present general

condition of the market, the stringency of money, and the keen competition prevalent amongst foreign exporters, have tended to reduce the percentage of the deposit with order to the minimum, if not to completely eliminate it, or even cause business to be effected to a gradually larger extent on a credit basis.

An inclination on the part of European houses to grant credit facilities, often extensive, to the Greek market has been observed in the past few years, and the problem of extending credits to importers in this field becomes more and more important. It is not recommended that exporters should take undue risks, but at the same time, given the severe competition existing in Greece, a policy of systematically refusing to grant credits should not be followed. No fixed rule can be laid down in the matter of credits, but in considering this question exporters should first satisfy themselves as to the reliability of the local agent, the nature of foreign competition, competitive prices, and the status of the concern to which credit is to be extended.

In regard to what imports are generally financed by the National Bank of Greece, which opens irrevocable confirmed credits with New York banks in favour of exporters against 30, 60, and 90 days' acceptances of importers. For flour, terms are either irrevocable confirmed credits at port of shipment or cash against documents, depending on status of importers. In the case of machinery, methods of payment vary according to the country of origin and the kind of machinery imported. For industrial machinery, firms in Germany, Austria, and France extend credits up to twelve months, guaranteed by mortgages on industrial plant and machinery. As regards agricultural machinery, German, Swedish, and Hungarian concerns demand from 15 to 20 per cent cash, balance over three harvests. Sales have recently been made by German concerns on the basis of payment to be extended over four harvests, but these terms are strongly deprecated locally. British manufacturers ask for from 15 to 20 per cent cash and the balance in three harvests. Americans generally insist on payment at twelve months, but a few houses accept over two and even three harvests. Extensions are being granted throughout Greece when there is a failure of crops. In this connection Continental houses seem to be more lenient than British and American manufacturers, and such an attitude on the part of European concerns creates a very favourable impression amongst the consumers. In the matter of provisions, imports are paid by cash against documents or by short-term acceptances. In hardware, owing to keen competition, Germany grants credits up to twelve months. In the case of leather, credit is generally restricted to a period of thirty days. In the textile trade, Czechoslovak, Italian, and German exporters extend longer terms than Great Britain, the Continental concerns granting up to 120 days.

Along with the question of granting credits is that of despatching goods on consignment. The policy of shipping goods on consignment is not without risk, but in the hands of a reliable and well-established agent the system has much to commend it, as agents possessing stocks for immediate delivery are in a strong position, especially in the case of the buyer from the provincial towns who comes to the main centres of distribution to make cash purchases.

It should be noted that extreme caution must be exercised by exporters despatching goods on consignment to this market or extending credit facilities.

COMMERCIAL LANGUAGES

Greek business men in the centres of import trade do not expect foreign concerns to carry on correspondence with them in the Greek language: as a rule they are proficient in more than one foreign language. It remains, however, that French is *par excellence* the commercial language of the business community in Athens-Piræus, but English and German are gaining some ground, particularly amongst the younger generation. Foreign exporters to this country should therefore use in preference the French language.

QUOTATIONS

Competition is very keen in the Athens-Piraeus market, as well as in the other centres of import trade in Greece. When quoting for the Greek market foreign concerns should give their lowest prices. All quotations should be c.i.f. Greek ports, if possible; they may be in Canadian or American currency, or again in pounds sterling. Commission and discounts should be distinctly stated.

WEIGHTS AND MEASURES

There are special Greek weights and measures, but exporters may use the metric or English units, as Greek merchants are well versed in them.

SAMPLES

Samples for the Greek market should be perforated or cut, when feasible, to avoid paying customs duties, and if sent by parcel post, to ensure prompt delivery it is preferable that they be registered.

PRINCIPAL BANKS

Appended is a list of the principal foreign and Greek banks in Athens:—

Foreign Banks.—Banca Commerciale Italiana e Greca (Italian); British-French Discount Bank, Ltd. (British and French); Ionian Bank Limited (British); American Express Company, Inc. (American).

Greek Banks.—Bank of Greece, National Bank of Greece, Bank of Athens, Popular Bank, Orient Bank, Bank of Chios, and Bank of Piraeus.

VIII

Conditions and Prospects in the Salonica Trade Area

Salonica, capital of the province of Macedonia, whose population is estimated at 350,000, promises to be the most modern town in the Near East when rebuilding is completed, and it is the port through which almost all foreign goods destined for Macedonia, Thrace, and Northern Thessaly are imported, Southern Thessaly being supplied from the Athens-Piraeus market. The Salonica market also extends to Southern Yugoslavia, through the towns of Uskub, Nisch, and Monastir; to Southern Albania through Koritsa; and some classes of goods even find their way to Belgrade, the commodities destined for Albania and Yugoslavia being imported principally through the free zone. Salonica is, after the Athens-Piraeus market, the most important business centre in Greece, and owes its importance to the fact that it supplies the requirements of a hinterland of some two million inhabitants. The volume of business has rapidly increased during the last few years, but trading conditions have become far more difficult, and competition now is so keen that little profit remains for the local agent or merchant. Before the arrival of the refugees from Asia Minor the business of the town was almost entirely done by the Spanish Jew element—the Jews in Salonica are descendants of refugees from Spain who were driven into exile by the persecutions of Ferdinand and Isabella in the fifteenth century—who carried on a sound and profitable business for both themselves and the foreign houses whom they represented. To-day, owing mainly to high taxation and the competition from close on one thousand refugee commission agents or merchants, many of the Jewish concerns have realized their effects and gone to France or elsewhere. Fortunately, there are still a number of old-established agents and merchant houses through whom foreign exporters can

to business, but of the one thousand-odd agents and merchants to be found in Salonica only about fifty—principally Spanish Jews—have a really sound business knowledge.

The Salonica market is not a quality market; price is as a rule the determining factor.

According to figures furnished to this office by the Department of National Economy, the commodities imported into Greece through the port of Salonica in 1929 and 1928 respectively amounted to 482,320 and 408,101 metric tons. Quantities in the principal products were as follows:—

Commodity	1929	1928
	In Metric Tons	
Livestock and fishery	5,163	4,204
Agricultural products	141,918	127,302
Colonial goods and vegetable products	8,395	9,369
Oils and oil seeds	2,200	3,128
Spirituous beverages	169	123
Sugar and confectionery products	14,329	15,616
Leather, leather goods and hides	598	595
Forest products and articles in wood	134,468	111,007
Minerals	108,351	81,150
Metals and metal goods	36,492	30,052
Scientific and musical instruments	235	211
Pottery and glassware	15,457	10,584
Industrial and pharmaceutical chemicals	2,973	3,457
Perfumery and soap	79	83
Colours and tanning materials	1,324	1,305
Paper and paper goods	2,292	2,341
Rubber and rubber goods	304	276
Textiles	6,059	5,940
Sporting goods and toys	28	24
Hats	10	10
Vehicles	1,353	1,132
Ammunition and explosives	14	12

SALONICA FREE ZONE

In the autumn of 1925 a free zone, the object of which is to favour the expansion of transit trade to Yugoslavia and Albania, was inaugurated at the port of Salonica. Statistics of goods exported therefrom to the two above-mentioned countries for the years 1927 and 1928 show that imports into Yugoslavia from the Salonica free zone were 14,155 metric tons in 1928 as against 20,100 in 1927. Imports into Albania from the same source were 2,744 metric tons in 1928 compared with 4,126 in 1927.

SALONICA INTERNATIONAL FAIR

Since 1925, during the month of September an international fair, in which all classes of national manufactured goods and raw materials are exhibited, has been held in Salonica. Some of the Balkan States, together with Hungary and Japan, also participated officially, and British, American, German, French, and Italian goods were exhibited. This fair attracts annually a large number of people to Salonica. Although much business may not be transacted at the fair itself, its propaganda value owing to the number of visitors from the provincial towns is considerable, and it is believed that it would be to the advantage of Canadian exporters if they patronized it with commodities of interest to the Salonica market. Exhibits can be made directly or through local representatives, and applications for space must be received not later than July 30 in each year. Space in closed pavilions costs about \$4 per square metre for a minimum area of 5·30 square metres, whilst that in open sheds with roof and rear wall, approximately \$2·50 per square metre for a minimum of 24 square metres;

open space for building pavilions is valued at about \$1.75 per square metre for a minimum area of 20 metres, there being the privilege of keeping the pavilions till the ensuing year.

FOREIGN IMPORT TRADE

The principal commodities shipped to Salonica from abroad comprise textiles, hardware, earthenware, agricultural machinery and plant, electric plant and accessories, Diesel engines, dynamos, industrial machinery, marine engines, motor vehicles and accessories, rubber goods, pharmaceutical specialties, musical instruments, typewriters and office appliances, leather, building materials, sanitary appliances, radio sets, provisions in general, etc. Brief details are hereafter given with respect to the above commodities:—

Hardware.—Most classes of hardware are imported from Germany, Austria, and Czechoslovakia, and enamelled hollow-ware from the two last-named countries. Cheap cutlery, nickel-plated and white metal goods come from Germany and small quantities of silver-plated goods from France. Certain classes of small hardware, also some cutlery and machine tools, come from Great Britain. The British article in these lines is generally preferred, but price is usually the obstacle in the way of business. Canadian hardware is not known in the market.

Earthenware.—This is imported principally from Germany, Czechoslovakia, and Austria.

Electrical Plant and Accessories.—During the last few years electric light has been installed in over 100 towns and villages and development work is going on continuously. Most of this business has been secured by such firms as Allgemeine Electricitts Gesellschaft, Lnz of Budapest, France Tosi of Legnano, Marelli, etc. There is a demand for generators, dynamos, electric motors and batteries.

Small electric fixtures and fittings find a ready sale and are nearly all German. Such articles as switches, fans, electric irons and cooking apparatus come from Germany and a few from Italy, electric bulbs being mostly Dutch or German (Phillips or Osram). There is much business to be done in this branch of trade provided German, Italian, and Dutch competition can be met. There is practically no demand for wireless apparatus.

Diesel Engines, Dynamos, and Industrial Machinery.—There is an increasing demand for this type of machinery, viz., diesel motors, steam engines and boilers, hydraulic and steam turbines.

Marine Engines.—Hundreds of small sailing vessels used in the fishing and coasting trade are fitted with auxiliary motors varying from 5 to 100 horse-power, but those mostly favoured are the semi-diesel engine of from 12 to 36 horse-power. Popular makes are the Swedish Bolinder & Skandia, several well-known American makes, and the Italian "Avance." In the matter of price buyers are not prepared to pay more than about \$75 per horse-power. The principal markets are Salonica, Volo, and Cavalla.

Motor Vehicles.—Over 90 per cent of this business is in the hands of the United States. Notwithstanding the fact that the roads are bad and often non-existent, a larger business is being done every year in passenger and commercial vehicles for transport both in town and country, and when the road program, which is now being carried out, is terminated in a few years' time the trade will greatly increase. The commercial car trade seems to offer the best prospects,

but owing to the bad roads and to the unsafe condition of bridges light lorries of 1½ to 3 tons are preferred. The makes of lorries chiefly employed are Ford, Chevrolet, Graham Brothers, Brockaway. Many ex-war lorries are still in use.

Motor Accessories.—There is an increasingly large business in motor accessories. This trade does not seem to have been seriously tackled by manufacturers so far. There is an opening for vulcanizing plants, and brake linings find a ready sale.

Rubber Goods.—There is a rapidly growing market for rubber goods, which include such articles as rubber tires, hose, belting, waterproof cloths, elastics, and overshoes. The total value of this trade done in the three provinces during 1928 was between \$250,000 and \$300,000, and the current year's business will probably show a 50 per cent increase on this figure.

Rubber Tires.—There are twenty-eight foreign competitors on the market, of which twenty are American, the most popular makes being Goodyear, Goodrich, Firestone, and Fisk. The Italian firm of Pirelli hold a leading position in the solid tire market and probably do 50 per cent of the business; their trade in pneumatic tires is very small. The Michelin Company two years ago held a leading position in the pneumatic tire trade, but to-day, owing to the failure of their new type, they do little business. The "Continental" does a certain amount of business.

Covers and Tubes for Cycles.—There is an appreciable business to be done in these articles.

Rubber Hose.—There is a good sale for garden and garage hose, also for suction or armoured hose.

Overshoes.—Overshoes are popular, but most of this trade is done by Hutchinson of Paris, also by Russian and Czechoslovak manufacturers.

Pharmaceutical Specialties.—These goods are mostly imported from Germany, France, Switzerland, and Italy.

Photograph Apparatus and Musical Instruments.—The former are mostly American (Kodak) and German (Agfa). Gramophones come principally from the United States and France, and a few from the United Kingdom.

Typewriters and Office Appliances.—These are imported from the United States, Germany, and Italy.

Leather for Uppers.—The boot and shoe industry is protected and the article is produced mostly by small bootmakers who make boots and shoes by hand in their own shops. Sole leather of local manufacture is used, but uppers for good-quality boots are imported in appreciable quantities from the United States, France, and Germany. Glacé kid, patent and suède leathers come mostly from the United States and box calf from France. The American "Naco" calf is well known. This is a cash-against-documents business, as prices are very close-cut. There seems to be no opening for Canadian manufacturers in these products.

Building Materials.—Large quantities of material for the erection of cement concrete buildings are being imported. Practically all of this business goes to Continental countries.

Sanitary Appliances.—There is an increasing business being done in sanitary appliances, such as baths, closets, washbasins and geysers, etc. Germany is the strongest competitor.

Tinned Fish.—Every grocer's shop carries a stock of Norwegian herrings and Californian sardines, mackerel, and squid, as well as American and Japanese salmon. Except for lobsters, Canadian tinned fish is practically not to be seen in Salonica.

Dried and Smoked Fish.—The French article is generally preferred owing to its cheaper price, and there is very little demand for Labrador, Newfoundland shore, or Scotch dried cod, haddock, or hake.

Provisions in General.—Salonica is a good market for provisions, but Canadian trade seems to be hindered by higher customs duties.

MARKET CONDITIONS IN SALONICA

The gist of the views expressed on the occasion of interviews with two of the leading bankers in Salonica on the business situation follows:—

The first stated that the economic stringency during the past few months had become tighter than ever. Agriculturists could not obtain money from tobacco merchants, and in turn were cutting down their purchases from the town, with the result that wholesale and retail dealers are without their usual amount of business and in many instances unable to meet bills due. To this slump in trade, provoked by the damage from rain to the tobacco crop of 1929, the consequent poor quality of the leaf and excessive quantity unsold, coupled with the fact that the large companies had been restricting purchases and paying low prices, have now been added the difficulties in which importers of coffee—a large item of trade in Salonica—have been involved by the situation in Brazil and heavy falls in prices.

The other banker gave it as his opinion that the situation was definitely worse than in 1929, and he prophesied that the whole of the present year would be difficult. The powers of consumption and absorption of the market in Macedonia were falling, and every one was endeavouring to economize. Moreover, he regarded the recent law declaring a moratorium till November 1, 1930, in favour of persons whose main occupation is the cultivation of the land—i.e. as concerns Macedonian tobacco in particular—as an aggravation of the situation, for as a result firms and individuals trading in the towns claiming to be connected with the tobacco trade would in turn seek to impose the moratorium on their creditors—a state of affairs which appears to be covered by article 4 of the law in question by which creditors of agriculturists, who themselves are unable to meet their obligations to third parties as a result of the moratorium granted to the agriculturists, may also benefit by the moratorium. He considered that Canadian concerns should be warned to proceed with extreme caution in their dealings and credits.

TRADE ROUTES

Canadian products shipped to Salonica are mostly transported by the American Export Lines, which load them at New York. They also find their way to this port through London, Liverpool, or Genoa. Grain and flour are mainly brought by the American Export Lines or by ships specially chartered for a full cargo.

REPRESENTATION IN SALONICA

Foreign business in Greece is carried on from three main centres—that is, Athens-Piræus, Salonica, and Patras—and it is most important to realize that the Salonica market cannot be worked either from or through Athens; it is a market of its own, and direct representation is essential. In the past, owing to the sound business methods of the Spanish Jew element who dominated the trade, Salonica, like Patras, enjoyed a better reputation than Athens, but it is being threatened to-day by the inexperienced business methods of a large number of the refugee agents, who through excessive competition and their necessity to sell in order to earn a livelihood overstock their buyers and often sell at ruinous prices. It is estimated that the trade in Salonica is bound to increase when conditions are better, but profitable business can be effected in

this market only through a good local representative, and Canadian exporters who are desirous of starting business with this centre will be well advised to exercise the greatest caution in the selection of their agent. Direct trading without an agent is to be deprecated, as this method is bound to lead to disaster sooner or later.

METHODS OF PAYMENT

What has been said about methods of payment in the Athens-Piraeus market equally applies to the Salonica import trade centre.

GOODS PREFERRED

There is a general preference amongst merchants and buyers for British goods, but the public cannot afford to pay a higher price for them than they would have to pay for similar foreign goods. Business is often lost to British exporters owing to the difference in price and more often to better credit facilities offered by foreign manufacturers, or to the unsuitability of the article. Delivery is also an important factor. Competitors like Czechoslovakia, Austria, Germany, and Italy are able to deliver goods within a few days after receipt of order. The close proximity and direct rail communication between Greece and these countries enables them to give it their personal attention and foreign representatives make frequent visits at regular intervals. These representatives not only call on their agents and buyers, but also study the special requirements of the market as their principals are ready and eager to specially adapt their goods to satisfy local tastes.

Much publicity is given to many classes of foreign manufactures by advertising, practical demonstration, and effective illustrated matter, which is freely circulated amongst buyers. This keenness on the part of German, Czechoslovak, Italian, and Austrian manufacturers has resulted in an entirely new trade having been built up by them during the last few years. Over one hundred towns and villages in New Greece have put in electric installations during the last five or six years, which are all German. Czechoslovak, Italian, and German textiles, which were hardly known a few years ago, are now on sale everywhere. During the same period American manufacturers have sold thousands of motor cars and lorries. The market for agricultural machinery and plant has gone largely into American and German hands.

Canadian products are represented in the Salonica market almost exclusively by wheat, flour, and some agricultural machinery, but it is claimed that the preference shown for goods of British origin would easily extend to Canadian commodities should quotations be in line with those for similar commodities from other countries.

COMMERCIAL LANGUAGES IN SALONICA

Spanish Jews, together with refugees from Constantinople and Smyrna, form the great majority of the merchants in Salonica, and both these elements have received the greater part of their education in French schools, with the result that they are fully conversant with the French language. On the other hand, very few business men, if at all, know the English language. Canadian firms would consequently be well advised when dealing with Salonica merchants to use the French language for their correspondence and literature, except in the case of British houses, who are very limited in number, as otherwise there is every possibility that their offers will not be taken into consideration.

QUOTATIONS

Quotations for the Salonica market should be c.i.f. this port if possible; they may be in Canadian currency or in pounds sterling; commission should be distinctly stated.

WEIGHTS AND MEASURES

Greek weights and measures are in existence, but the Salonica merchants are well versed in metric and English weights and measures.

PRINCIPAL BANKS

The following is a list of the principal banks in Salonica, by whom every facility will be extended to Canadian exporters to this field in the way of status reports, general information, etc.: (1) Bank of Greece; (2) National Bank of Greece; (3) Bank of Athens; (4) Popular Bank; (5) Ionian Bank Limited. All these banks have their headquarters in Athens.

PRINCIPAL PRODUCTS SOLD

Wheat and flour are the two outstanding Canadian commodities in the Salonica market, but for various of the lines referred to above there should be an opportunity for the Dominion's products to compete. However, all firms interviewed were unanimous in stating that the lack of direct communications and absence of a commercial treaty were serious hindrances to the development of Canada's trade. In fact, competition is very keen in this market, and transshipment charges together with higher duty rates are handicaps which prevent many of the Canadian lines from entering this centre. Price is the determining factor.

IX

COMMODITY MARKETS

Wheat

CROP, TRADE PROSPECTS, AND TRADE CENTRES

Out of a total area of 3,090,148 hectares under cultivation in 1928, 538,040 hectares were sown to wheat, and the crop was estimated at 356,129 metric tons. Imports amounted to 475,992 metric tons. In spite of the fact that a slightly larger area was sown to wheat in 1929, imports of this commodity stood at 597,909 metric tons; the increase of 121,917 metric tons over the preceding year was due to a fall in the average yield. The crop prospects for this year up to a few weeks ago were highly favourable, but recent heavy rainfalls and hailstorms in several regions of Greece seem to indicate that the yield of wheat may be further reduced and imports correspondingly increased. It must be added, however, that under ordinary circumstances the crop of wheat in this country is bound to become more important, as the area sown to wheat increases from year to year. When the area now being reclaimed in Macedonia and Thrace—300,000 hectares—is ready for cultivation, the production of this commodity will assume much greater importance. However, Greece is still a good market for foreign wheat and will be for a few years to come. The principal wheat regions in this country comprise Macedonia and Thessaly, the production in Thrace and some other parts being more or less insignificant. The main port of entry for foreign wheat coming to this market is Piraeus, followed by Salonica and Patras.

IMPORTS

According to Greek official statistics, imports of wheat from the United States in 1929 and 1928 were 299,697 and 233,710 metric tons respectively, and from Canada 143,499 and 169,261 tons, thus indicating an increase of 65,987 metric tons as compared with 1928 in the case of the United States, and a decline of 25,762 metric tons in that of Canada. It should, however, be added that the Greek returns cover only shipments from the Dominion made through

Canadian ports; shipments through United States or other foreign ports lose their identity. It is believed that the Greek returns of imports from Canada in 1929 are short by 50,000 tons of the actual figures.

Details as to countries exporting wheat to this market, together with tonnage and value for each, are given hereunder in table form for 1929 and 1928:—

Country	1929		1928	
	Metric tons	Drachmae	Metric tons	Drachmae
India.. . . .	302	1,445,000	2,765	16,779,000
Egypt.. . . .	1,408	6,881,450	2,029	10,547,375
Argentina.. . . .	56,095	234,320,350	48,073	233,219,050
Australia.. . . .	29,455	145,006,300	6,025	28,961,200
Bulgaria.. . . .	3,780	15,759,300	6,367	31,608,896
Jugoslavia.. . . .	14,875	64,498,950	1,439	7,218,342
United States.. . . .	299,697	1,334,428,369	233,710	1,107,504,543
Canada.. . . .	143,499	680,337,660	169,261	817,246,300
Hungary.. . . .	33,048	142,891,950	—	—
Roumania.. . . .	13,043	57,582,963	3,597	18,777,150
Russia.. . . .	10	50,000	2,422	12,063,000
Turkey.. . . .	152	825,425	277	1,656,538
Other countries.. . . .	2,545	10,892,130	27	144,385
Total.. . . .	597,909	2,694,922,847	475,992	2,285,725,779

GRADES IN DEMAND

Hard winter and Manitoba No. 3 are generally in favour, but there is this year a tendency to employ higher grades on account of lower prices. The local product being of an inferior quality and rather poor in protein content, imported wheat is used entirely for blending purposes.

SELLING METHOD AND TERMS

Although the larger part of the foreign wheat shipped to this market is sold through agents specializing in this trade, a pool consisting of a certain number of flour millers having a buying agent in New York also receives cargoes which are divided amongst its members. Imports of wheat are generally in the form of large shipments by chartered vessels or tramp steamers, and are as a rule financed by the National Bank of Greece, which opens irrevocable confirmed credits with New York banks in favour of exporters against thirty, sixty, or ninety days' acceptances by agents at this end.

DEVELOPMENT OF CANADIAN TRADE

The possible development of sales of Canadian wheat in Greece is intimately related with the question of price as compared with competitors, and particularly with the United States, and also in some measure with a more active propaganda and closer contact between the Dominion's exporters and importers in this field.

A list of the principal Greek agents specializing in the wheat trade is on file at the Department of Trade and Commerce, Ottawa, and may be obtained on application.

Flour

In the course of the past few years the flour situation in Greece as affecting imports has gone through a series of more or less unfavourable changes. Stimulated by the milling industry, the object of the Greek Government has been to afford it adequate protection, and this has been followed by a decline in imports.

WHEAT AND FLOUR DUTIES

Wheat and flour are now dutiable as follows, minimum rates applying to all countries:—

Wheat

	Maximum per 100 kilograms or 220 pounds	Minimum
Duty in metallic drachmae.. . . .	7 50	6 00
Duty in paper drachmae (conversion rate—15).. . . .	112 50	90 00
Duty in Canadian currency.. . . .	\$1 48	\$1 18
Internal taxes (75 per cent of duty) in Canadian currency.	\$1 11	\$0 88

Flour of All Grades

Duty in metallic drachmae.. . . .	11 00	10 70
Duty in paper drachmae (conversion rate—15).. . . .	165 00	160 50
Duty in Canadian currency.. . . .	\$2 17	\$2 11
Internal taxes (75 per cent of duty) in Canadian currency.	\$1 63	\$1 58

TRADE PROSPECTS

Owing to the rates of duty now imposed on flour being disproportionately high in comparison with those on wheat, and to the rigidity of the regulations with respect to content, shipments to this market will be further handicapped, and are likely to be much curtailed. Imports of flour in 1929 and 1928 were, according to the Greek official statistics, as follows:—

Greece's Imports of Flour

Country	1929 Metric tons	1928 Metric tons
Egypt.. . . .	1,427	1,424
Australia.. . . .	2,443	3,736
Bulgaria.. . . .	193	2,530
France.. . . .	588	1,443
Jugoslavia.. . . .	189	40
United States.. . . .	20,918	35,427
Italy.. . . .	3,082	91
Canada.. . . .	1,241	3,707
Hungary.. . . .	992	164
Roumania.. . . .	25	188
Other countries.. . . .	124	374
Total.. . . .	31,222	49,124

As in the case of wheat, the figures of the above table do not give full credit to Canadian exports of flour to Greece. It is estimated that the amount of Canadian flour coming to this market stood in 1929 at about 4,000 metric tons.

CUSTOMS REGULATIONS

In order to be admitted into the country, flour must be of a taste which is neither sour nor rancid, and of an odour characteristic of good-quality flour, positively unbleached, not self-rising, free from adulteration of any kind, and more especially from chemicals such as persulphates, sulphate of ammonia, phosphate of calcium, and other products of a similar nature. Moreover, limits of impurities in each quality of flour are as follows:—

Quality of flour	Water Maximum per cent	Gluten Minimum per cent	Sulphuric Acidity per cent	Ash Maximum per cent	Bran Maximum per cent	Fatty Substances Maximum per cent
A.. . . .	13	26	0.070	0.6	0	1.10
B.. . . .	13	28	0.15	1.4	2	2.75
Pure... . .	13	28	0.10	1.0	1	1.40
Clears.. . . .	13.5	26	0.15	1.6	13	1.70
Semolina... .	13	28	0.07	0.8	0	1.10

The percentage of water may be increased by 0.5 per cent from September 15 to June 15; the gluten must present the vegetable peculiarities of gluten of good-quality flour; a tolerance of 10 per cent is permitted in the acidity of flour from June 15 to September 15; when the percentage of ash exceeds the limit fixed in the above table, flour in which that excess has been traced may be only permitted entry by decision of the Council of Chemical Services; the fatty substances are examined only in case of doubt as to quality. The responsibility of importers as to quality of flour extends to sixty days from the date it has been released from the customs warehouse. All kinds of wheat may be utilized, but flour must conform to the above regulations. When other cereals and pulse are milled, the word "flour" must be qualified accordingly.

PACKING

According to a decree under date of October 6, 1930, the weights of flour in bags permitted to circulate in Greece are 70, 53, and 49½ okes, and 5 kilograms, the bags of 53 okes being allowed for Australian flour only, whilst those of 5 kilograms for flour *de luxe* only. (One oke is equal to 2.8264 pounds, whilst 1 kilogram is equal to 2.2 pounds.) This regulation binds importers, but not shippers from abroad, who, however, for practical reasons would be well advised to adopt these weights. Sealing and labelling must be done by the importer on the day on which the flour is withdrawn from the customs depot. No marking regulations are imposed on the exporter.

GRADES OF FLOUR IMPORTED

"Patents" and "good clears" are in favour in the proportion of 25 per cent for the latter and 75 per cent for the former.

SELLING METHODS AND TERMS

Flour shipped to this market is as a rule sold through commission agents, commission running from 1½ to 2 per cent. Terms are irrevocable confirmed credits, or cash against documents, depending on the reliability of the agent to protect the exporter's interests.

TRADE CENTRES AND REPRESENTATION

Athens-Piraeus is the largest centre of trade for imported flour, Salonica coming second, and Patras third. Distinct agents should preferably be appointed in each of these centres.

Owing to the rigidity of the regulations concerning flour imported into this country and to the high duty imposed in comparison with wheat, trade prospects are not promising.

Provisions

TINNED SALMON

Amounting a few years ago to about 10,000 cases, annual imports of tinned salmon have been reduced to approximately 3,000 cases. This product has been to a large extent supplanted by tinned mackerel, which is cheaper. Japan has the bulk of the trade in tinned salmon, with the United States, which sells in preference tinned mackerel, taking a limited share; a few cases of Canadian chum are shipped to this market through agents in London. Canadian salmon is dutiable under the maximum rate; that originating in Japan and the United States is entitled to most-favoured-nation treatment.

The cheaper grades of salmon are preferred; 1-pound tins (talls) are in favour. Business is effected through commission agents. The usual commission is 3 per cent. Terms are cash against documents. There are no special regulations governing imports of tinned fish.

The rates of duty and internal taxes applicable to tinned salmon entering Greece are as follows, the minimum rate applying to the United States and Japan, whilst Canada is subject to the maximum rate:—

Tariff Item No. 4d—	Maximum Per 100 Kg. or 220 Pounds		Minimum
DutyMet. Drs.	30	(\$ 5 79)	20 (\$3 86)
Internal taxes		4 34	2 89
Total in Canadian currency	\$10 13		\$6 75

The above rates of duty and internal taxes are applicable to all varieties of tinned fish imported into Greece.

TINNED MACKEREL

The greater part of the tinned mackerel consumed in Greece (about 18,000 cases annually) originates in the United States, principally in California; Japan, owing to higher prices, has only a small share of the trade. The principal American brands are "Californian Leader," "Samoa," "El Campo," and "King Solomon." The demand is generally for the 1-pound tins, identical to salmon tins, forty-eight to the case. Tinned mackerel is at present quoted at from \$4.75 to \$5 per case of forty-eight talls and \$6.25 to \$7 per case of ninety-six halves c.i.f. Piraeus. Business is generally carried on through commission agents, who take 3 per cent as their commission. Terms are cash against documents. The same conditions as regards tariff apply as in the case of tinned salmon.

DRIED CODFISH

Imports of dried codfish amounted in 1929 to 8,927 metric tons as compared with 9,886 metric tons in 1928 and 12,519 metric tons in 1927. Greece has always been a good market for dried codfish, but a more abundant catch of fish on the coast during the past two years has reacted on the imports. French codfish, which comes first on the market, has about three-quarters of the total trade, followed by Labrador with one-quarter. Canadian codfish is of too high a quality, and consequently too expensive for consumers in this country; price is the determining factor. The duty (minimum, 4 metallic drachmae, or \$0.77 per 100 kilograms or 220 pounds) and internal taxes (\$0.58) are the same for all countries.

TINNED LOBSTERS

The Greek market formerly absorbed about 3,000 cases of tinned lobsters per annum, but in the past few years ground has been lost to the cheaper Japanese crab, with the result that only about 1,000 cases of one-half and one-quarter pound tins are now consumed. Canadian lobsters are generally sold to this market through London agents; only small quantities are sold direct. Under present conditions it is not expected that tinned lobsters will recover their former position in the Greek market.

Lobsters are packed in quarter-, half-, and one-pound tins, forty-eight one-pound and half- or quarter-pound tins to the case. Recent quotations per case were as follows: \$31 for one-pound tins, \$32.50 for halves, and \$19.25 for quarters. These refer to quotations c.i.f. Piraeus, including a 5 per cent commission.

TINNED CRABS

Some 3,000 cases of tinned crabs are imported annually into Greece. Japan is the source of supply. The nominal net contents of the tins, round and

flat, are 6½ ounces. Cases contain ninety-six tins. Prices are generally fixed in April. First-grade tinned crabs are now quoted at about \$26 per case c.i.f. Piraeus, including agents' commission of 3 per cent.

TINNED SARDINES

About 17,000 cases per annum of tinned sardines are being imported. Spain and Portugal are the chief sources of supply. France is in the market for a product *de luxe* on a small scale; Norway ships some quantities of small bristlings which pass under the name of sardines; and some small shipments of sardines in tomato sauce originate in the United States. Canadian sardines, which were formerly sold in Greece, are not at present on the market. Spanish, Portuguese, and French sardines are packed in olive oil, those from Norway are in groundnut oil, and those from the United States in tomato sauce. Spain, Portugal, France and Norway employ the quarter club tins (30 and 40 millimetres) with a key; the United States the 15-ounce oval tins. The size of the fish is immaterial for the cheaper-quality sardines, but for the higher grade there must be from six to eight fish to the tin. Quotations on Spanish and Portuguese sardines in olive oil range, depending on the quality, from \$6.30 to \$7.30 per case of 100 tins (quarter club, 30 millimetres) and from \$8.70 to \$9.75 per case of 100 tins (quarter, 40 millimetres) c.i.f. Piraeus, agent's commission of 3 per cent included. American sardines in tomato sauce are quoted at \$3.70 per case of forty-eight tins c.i.f. Piraeus, agent's commission included.

TINNED CLAMS

It is estimated that only 200 cases of tinned clams are being imported annually into Greece. There seems to be some prejudice against tinned clams on account of their not always keeping well in the warm climate. The prospects for an increased trade are not promising. Japan is the chief source of supply.

TINNED SHRIMPS

A slight falling off in imports of tinned shrimps was observed last year, as the catch seemed to have been only a poor one. Annual imports amount to approximately 4,000 cases, forty-eight tins to the case. Japan has the greater part of the trade, followed by the United States. "Geisha" and "Pe-La-Co" are the two principal brands in the market. The American tins contain 5 ounces net, those originating in Japan are of the same nominal weight. In May last direct shipments from New Orleans were offered at from \$6.50 to \$6.80 per case, commission of 3 per cent included, c.i.f. Piraeus. Tinned shrimps for shipment to Greece should be put up in juice. In order to secure a footing in the trade, Canadian shrimps should be of as high a quality as the American and sell at the same price, the difference in duty and internal taxes being given due consideration.

TINNED MEAT

Fresh meat, particularly mutton, is fairly plentiful in Greece; the inhabitants do not buy tinned meat. Libby's corned beef was the only tinned meat found in the market, for sale among the foreign population.

CONDENSED MILK

The fresh milk supply in Greece, chiefly from goats and sheep, is far from being sufficient to meet the requirements. It is supplemented by condensed milk all the year round, but sales are brisker during the summer months. Annual imports amount to approximately 300,000 cases, forty-eight 14-ounce tins net to the case. The demand is for both sweetened and unsweetened. The principal brands to be found in the market are "Vlaha" (Swiss), "Nestlé" (Swiss), "Hollandia" (Dutch), "Voskos" (Dutch), "Trofos" (Italian),

"Mont Blanc" (French), and "Libby's" (American). More than 50 per cent of the condensed milk imported into Greece is of Swiss origin, the Nestlé company taking almost the whole of Switzerland's share of the trade. This concern has its own branch in Athens and sells direct to wholesalers and retailers, thus saving the middleman's commission. Holland and France have fair sales, but the Italian brand "Trofos" is reported to have the next largest business after the "Nestlé." The United States supply a comparatively small proportion of the unsweetened milk imported. Prices vary slightly, and there is some under-cutting. The "Hollandia" brand is usually slightly lower in price than the cheapest of the better-known brands. "Nestlé" sells at about \$7.50 per case c.i.f. Piraeus to wholesalers, all expenses included; quotations on some other brands run as low as \$4.50. The Canadian product can hardly have a chance of entering this market owing to the wide difference between the maximum rates (applicable to Canada) and the minimum rates of duty.

In order to be admitted into Greece, condensed milk must not have lost its freshness nor contain adulterated sugar or preservatives, whilst no skimmed milk may be used in its preparation. Labels must be in Greek, or in any other language or languages with a translation into Greek, and indicate the amount of water to be added in order that the preparation may be assimilated to natural milk, the amount of water to be added for children's use, together with the names of the manufacturer and place of preparation.

Duty and Internal Taxes on Condensed Milk

Tariff Item No. 3c2—	Maximum Per 100 Kg. or 220 Pounds	Minimum
DutyMet. drs.	30 (\$ 5 79)	10 (\$1 93)
Internal taxes	4 34	1.45
Total in Canadian currency	\$10 13	\$3 38

POWDERED MILK

The "Glaxo" brand of powdered milk, a product from New Zealand sold in this market through London, is sold to the extent of 5,000 cases per annum, the "Nutricia" (Dutch) to the extent of 800 cases, and there are small sales of "Klim." An effort is being made to introduce the "Dry-Co" brand (American). "Glaxo" is packed in $\frac{1}{2}$ -, 1-, and 2-pound tins, twelve 2-pound, twenty-four 1-pound, and forty-eight $\frac{1}{2}$ -pound tins to the case. Cases of 2-pound tins sell at \$18, 1-pound at \$18.75, and $\frac{1}{2}$ -pound at \$20. These quotations are c.i.f. Piraeus, and include a commission of 3 per cent. In order to enter the market Canadian powdered milk would require to sell at as low a price as "Glaxo," due consideration being given to difference in duty, as New Zealand, having adhered to the Anglo-Greek commercial treaty, is entitled to the minimum rate. An energetic agent would also be indispensable.

Duty and Internal Taxes on Powdered Milk

Tariff Item No. 3c3—	Maximum Per 100 Kg. or 220 Pounds	Minimum
DutyMet. drs.	50 (\$ 9 65)	20 (\$3 86)
Internal taxes	7 24	2 89
Total in Canadian currency	\$16 89	\$6 75

BACON AND HAMS

There are no locally cured hams and bacon in Greece, but the market for these imported commodities is limited, their price not being within the reach of the masses. Bacon and cooked hams are consumed only by the better-class Greeks and by foreign residents. Germany has the largest share of the trade, with France and Great Britain selling small quantities.

BUTTER

A dairy industry in the proper sense of the term does not exist in Greece. In fact there is only one fairly well-equipped factory, in Corfu, which is known to be making butter. The quality of its production is better than any of domestic make, but inferior to the imported article. Corfu butter is sold in small paper packets of 30 grammes and in small tins, at prices slightly lower than those obtaining for imported butter. The butter produced in Greece is made for the most part under doubtful sanitary conditions by farmers and peasants, who dispose of it in the local markets at the best price they can secure. The production of butter is largely dependent on weather and pasturage conditions, but even under the most favourable conditions the milk supply is not large and the local butter is far from being able to meet domestic needs. About four-fifths of the butter requirements of Greece are obtained abroad. In 1929 imports for both table use and cooking purposes amounted to 697,246 kilograms in comparison with 531,557 kilograms in the preceding year. The principal sources of supply in 1929 were Yugoslavia, Turkey, the Netherlands, Russia, Roumania, and Tripoli. In 1928, 17,291 kilograms were credited to the United States, and in 1929, 108 kilograms.

No distinction is made in the statistics between butter for table use and that for cooking purposes, but it is known that the product sold in this market by Holland and the United States is exclusively for table use, whilst Russian and Jugoslavian butter is almost exclusively for cooking purposes. The products sold by other countries comprise butter for both table use and for cooking purposes.

Table butter as required in this country must be a full cream product, from pale yellow to white, unsalted and packed in sealed illustrated tins of $\frac{1}{2}$, 1, 5, 10, or 20 pounds. Cooking butter, yellow, unsalted, and of an inferior quality, is generally packed in barrels of from 100 to 200 pounds. The best buying season for table butter is from September to May. During the summer months sales of imported butter fall off considerably. The principal brands of table butter in the market are "Lugard's" (Dutch), "Vezet" (Dutch), "Milk-maid" (Swiss), and "Esbensen" (Danish). Prices are variable.

Butter is dutiable as follows, internal taxes being also given:—

Table Butter in Tins Weighing over 4 Kilograms

Tariff Item No. 3 b 4—	Maximum Per 100 Kg. or 220 Pounds	Minimum
DutyMet. drs.	160 (\$36 88)	110 (\$21 23)
Internal taxes	23 16	15 92
Total in Canadian currency	\$54 04	\$37 15

Table Butter in Tins Weighing 4 Kilograms and Under

Tariff Item No. 3 b 5—	Maximum Per 100 Kg. or 220 Pounds	Minimum
DutyMet. drs.	220 (\$42 46)	140 (\$27 02)
Internal taxes	31 84	20 26
Total in Canadian currency	\$74 30	\$47 28

Cooking Butter

Tariff Item No. 3 b 3—	Maximum Per 100 Kg. or 220 Pounds	Minimum
DutyMet. drs.	80 (\$15 44)	50 (\$ 9 65)
Internal taxes	11 58	7 24
Total in Canadian currency	27 02	\$16 89

The countries referred to above are entitled to the minimum rates of duty.

Customs Regulations.—To be admitted into Greece, butter from cows must fulfil the requirements of the country of origin as regards soluble volatile acids, saponification, and insoluble volatile acids. A certificate to that effect from the sanitary authorities of the country of origin must accompany each shipment of butter to this market.

CHEESE

Cheese is produced to some extent in Greece, the principal varieties being "Feta," "Kaseri," and "Kephalotiri," but some 1,500 metric tons are imported annually. Dutch and Swiss cheese are in favour. Yugoslavia, France, Albania, Italy, Denmark, Roumania, Russia, Turkey, Great Britain, and the United States are also contributors. It might be possible to introduce some lines in the Cheddar and Chester styles into this market.

TINNED CORN ON THE COB

Corn on the cob in tins is sold to a very limited extent in Greece. Tins containing five pieces retail at about 80 cents. This article is exclusively American.

ROLLED OATS

Annual imports of rolled oats are placed at approximately 1,000 cases. Rolled oats being essentially a breakfast food, it is doubtful whether they would become generally used, as the Greek breakfast generally takes the form of only a cup of strong coffee and a roll of bread, and climatic conditions militate against sales. The brands sold comprise "Quaker Oats," "3-Minute," and "Morton's Scotch."

HONEY

There are no imports of honey. On the other hand, exports are quite considerable. The production of this commodity from time immemorial has always been important in Greece.

TINNED VEGETABLES AND CANNED FRUITS, ETC.

No detailed figures are available with respect to the total production in Greece of tinned vegetables, canned fruit, preserved fruit (jams, jellies, and marmalades, and fruit glacés), but according to the Ministry of Agriculture it amounted in 1929 and 1928 respectively to approximately 2,750,000 and 2,200,000 pounds. Imports of tinned vegetables in 1929 totalled 81,709 kilograms (Italy 45,038 kg., France 10,864 kg., and the United States 10,429 kg.), and exports 426,497 kg. (United States 316,617 kg.). Canned fruit imports totalled 8,577 kg., chiefly from the United States, and there were very small exports. Imports of preserved fruits totalled 6,432 kg., chiefly from Egypt and Great Britain, and exports were 59,430 kg., principally to the United States and Egypt.

Except for currants, figs, and raisins, which are produced on a large scale, no local dried fruits are to be found in Greece. Dried figs, currants, raisins, apricots, prunes, peaches, and pears are consumed, but there does not seem to be a market for dried apples. Imports of apricots, prunes, peaches, and pears are quite important.

Catsups, sauces, and relishes, with the exception of tomato sauce to the extent of 2,800,000 pounds annually, are not being made locally. No figures are available as to imports, but they are said to be fairly important.

FRESH APPLES

Local apples, grown mainly in the Volo district, are of a low grade, small, sweet, and of a reddish colour. As a rule the crop is good only every other year. Even in the best years the yield is not sufficient to meet requirements. Annual

imports, 80 per cent of which are from the United States and 20 per cent from Russia, Turkey, and Roumania, amount to approximately 25,000 boxes when the domestic crop is good and to over 50,000 boxes when it is poor. Apples from abroad are packed in 40-pound boxes, there being from 88, 100, 113, to 125 apples to the box. Winesaps and Newtowns (American) are in favour. Apples are generally eaten raw. Sweet or mildly subacid, juicy, and both tender and firm apples, of a red colour, and in the sizes above mentioned, are principally in demand. The buying season runs from September to May. Canadian apples have not yet found a place in the Greek market, chiefly owing to price. The difference between the maximum rate of duty as applied to Canadian apples and the minimum rate under which those originating in the United States are assessed is, however, comparatively small, and the market is one that is well worthy of consideration. Names of Greek firms wishing to act as agents or to buy direct will be furnished on application by the Canadian Trade Commissioner's office in Athens.

Sales are either made direct or through commission agents, who take orders from wholesalers, who in turn sell to retailers.

Methods of payment consist in remitting from 25 to 40 per cent with order, the balance being paid against documents after arrival of the goods.

Duty and Internal Taxes on Apples.

Tariff Item No. 12 a 1—	Maximum Per 100 Kg. or 220 Pounds		Minimum	
DutyMet. drs.	3	(\$0 58)	1.50	(\$0 29)
Internal taxes.		0 43		0 22
Total in Canadian currency.		\$1.01		\$0 51

POTATOES

There are two crops of potatoes per annum in Greece, and they are of good quality. Imports average 35,000 metric tons. The principal sources of supply, in order of importance, are Cyprus, Hungary, Egypt, France, Italy, and Jugoslavia. The Greek market requires potatoes of a good appearance, preferably of a whitish-grey colour, medium size, and firm. Packing is in jute bags. Imports are generally sold through commission agents, but sometimes direct. Terms of payment are, in the majority of cases, confirmed irrevocable credits opened by importers in favour of exporters with a bank in the country of origin; business is also done to a small extent on a cash-against-documents basis.

Customs Regulations.—Imports of potatoes from Great Britain, Ireland, Denmark, Sweden, Norway, Belgium, Holland, Egypt, Cyprus, and Luxembourg into the Greek regions which are free from phylloxera are permitted provided that they are accompanied by a certificate of the sanitary authorities in the country of origin to the effect that this commodity was produced in districts which are not affected by phylloxera. No such certificate is required for shipments of potatoes designed for the Greek regions affected by phylloxera, all countries being entitled to export to these districts.

Duty and Internal Taxes on Potatoes

Tariff Item No. 9 k—	Maximum Per 100 Kg. or 220 Pounds		Minimum	
DutyMet. drs.	5	(\$0 96)	3	(\$0 58)
Internal taxes.		0 72		0 43
Total in Canadian currency.		\$1 68		\$1 01

SELLING METHODS AS REGARDS PROVISIONS

Provisions in general are sold through commission agents or general import houses, but practically always through commission agents who take orders on

behalf of both wholesalers and retailers. Commission ranges from 3 to 5 per cent, depending upon the article, and many agents also ask that the cost of telegrams, etc., be borne by the firm they represent. Advertising consists of window display, placards on hoardings, announcements in the daily press, and posters in public vehicles. Terms of payment vary from letters of credit, cash against documents, and acceptances at thirty, sixty, and ninety days. Goods are also shipped on consignment, and the agent effects monthly settlements for the goods sold. Under present conditions caution is recommended in the matter of granting credits and despatching goods on consignment.

It is preferable to appoint a distinct agent in each of the three main centres of trade in Greece—Athens-Piraeus, Salonica, and Patras—which are markets of their own for provisions.

Customs Regulations.—Exports of foodstuffs to Greece need not be accompanied by a pure food certificate. However, foodstuffs entering this market are always subject to analysis by the State Laboratory. The use of chemical ingredients, designed for improving the appearance of foodstuffs or for any other purposes, is absolutely prohibited. Moreover, according to various Government decrees, certain foodstuffs must fulfil given requirements as to nature of contents and limits of ingredients. This last point has been dealt with in the notes on these commodities.

A list of agents and importers dealing in provisions has been filed with the Department of Trade and Commerce, Ottawa, and may be obtained on application.

Building Materials

LUMBER

The forests of Greece are not properly exploited and the local saw-mill industry is quite primitive and undeveloped; consequently there is a large market for lumber. The principal kinds imported are spruce, white pine, pitch pine, beech, white oak, walnut, and maple. The imported lumber is used chiefly for building purposes, currant cases and barrels, and furniture. Imports of box shooks and staves are negligible, since the local industry is well organized and highly protected, but the larger share of the lumber utilized in the making of staves is obtained in foreign markets. Details as to quantities of lumber imported into Greece and sources of supply are shown in the following tables:—

Greek Imports of Lumber for Building Purposes

	Kilograms	
	1929	1928
Total	249,770,294	208,395,982
Jugoslavia	114,802,142	101,589,750
Roumania	103,744,304	83,901,110
Sweden	18,664,899	13,792,974
United States	2,970,177	1,096,501
Italy	2,446,205	2,468,943
Austria	1,812,585	987,810
Czechoslovakia	1,772,675	2,179,680
Germany	899,450	222,659

Imports of Lumber for Furniture Making

	Kilograms	
	1929	1928
Total	1,178,111	755,319
France	280,345	249,642
United States	46,355	62,236
Roumania	14,347	.....
Turkey	10,411	5,114
Italy	9,089	20,050

Imports of Lumber for Staves

	1929	1928
	Kilograms	
Total	10,157,550	5,622,351
Jugoslavia	7,593,655	4,505,291
Italy	642,772	102,504
Roumania	568,841	267,952
Turkey	266,490	477,173

Imports of Lumber for Boxes

	1929	1928
	Kilograms	
Total	36,877	29,528
Jugoslavia	33,175	.....
Roumania	355	10,628

LUMBER FOR BUILDING PURPOSES

Building trades are very active in Greece, especially in Athens and Salonica, which are greatly in need of building accommodation. Numerous houses are also being built throughout Greece for the refugees. The prospects for selling lumber in this market are consequently promising, but owing to lack of direct communications it is doubtful whether Canadian exporters will be able to secure for themselves a share of the business. All materials employed in the construction of houses for the refugees and of public buildings are admitted into Greece duty free.

White timber, mostly of the third grade, forms approximately 70 per cent of Greece's imports of lumber for building purposes. This is mainly supplied by Jugoslavia, Roumania, and Sweden. For better-class constructional work pitch pine and oak are imported. Pitch pine comes mainly from the United States (New Orleans); small quantities of an inferior quality are imported from Archangel. American pitch pine is of the "merchantable" quality. Oak comes principally from Czechoslovakia, with small quantities from Russia, the United States, and France.

Specifications of imported lumber consumed in Greece for building purposes and for public works such as bridges, etc., are on file at the Department of Trade and Commerce, Ottawa.

Shipments.—Lumber for the Greek market is, as a rule, shipped in parcel lots: importers who can afford to charter a steamer are few in number.

Marketing Methods and Terms.—Business in lumber is done through commission agents or direct. Terms of payment are cash against documents after the arrival of the goods for the first orders, and three months' draft on subsequent lots.

Customs Duty on Lumber.—Customs rates on lumber may be obtained by interested parties on application to the Department of Trade and Commerce, Ottawa.

BOX SHOOKS

The Government imposes a heavy duty on box shooks, with the result that none are being imported. A fairly large quantity of white pine, however, is being brought from abroad in the following dimensions to be utilized by the box-making industry: from 2 to 4 metre in length, 12 to 18 millimetres in thickness, and from 17 to 30 centimetres in width.

STAVES FOR WINE AND OLIVE OIL BARRELS

Staves for wine and olive oil barrels are imported on a limited scale, as the local barrel-making industry is highly protected. The staves coming to this market originate principally in Italy. The demand is mainly for oak staves, and it is not thought that Canadian staves can be hold in this market.

DOORS AND SASHES

This industry is well protected, and it seems that there is no possibility for foreign countries to sell doors and sashes.

VENEERS

France, Austria, and Germany are the principal sources of supply for veneers, France having by far the largest share of the trade. Veneers come to this market in various sizes, the thickness ranging from 7 to 10 millimetres. Quotations on Canadian veneers have been asked by some Greek furniture-making concerns, and interested Canadian firms are advised to get in touch with the Trade Commissioner in Athens, and send best prices c.i.f. Piraeus along with samples and full specifications.

Duty and Internal Taxes on Veneers

Tariff Item No. 47b—	Maximum	Minimum
	Per 100 Kg. or 220 Pounds	
Duty	\$ 7 72	\$ 5 79
Internal taxes	5 79	4 34
Total in Canadian currency	\$13 51	\$10 13

Shipments of veneers from Canada are under the maximum tariff rates.

PLYWOOD

Plywood is imported into this market on a fairly large scale, and originates mainly in France, Poland, Russia, Finland, and Lettonia, the French article being preferred. Imported plywood is used principally for furniture, wall decorations, and boxes.

INSULATING BOARD

Insulating board was first introduced into the Greek market three or four years ago, and it is not yet known whether it will be a suitable material for the warm climate of this country. At present its price is rather high in replacing the thin wooden laths which are in general use in Greece as a base for plaster work. To introduce insulating board the authorities or large building contractors must be interested in making tests; this might be done by a reliable agent. If these tests were to prove satisfactory and advertising were to be carried on, business should result. A stock would then have to be carried by an agent in order to meet any possible demands without delay.

Canadian firms interested in this market with respect to insulating board are advised to send samples, together with specifications (in French if possible) and quotations c.i.f. Piraeus, to the Trade Commissioner's office in Athens. Specifications should state whether the insulating board is fireproof.

CEMENT

The present brisk demand for cement in Greece is due to Government work on road and irrigation schemes and to progressive building. Although the local industry is rapidly expanding, it has as yet to be supplemented by some 75,000 metric tons of cement annually. However, it is expected that after a few years local cement will be produced in quantities sufficient for national needs. Out of the 75,000 metric tons of cement which are at present imported annually, Russia and Yugoslavia have an equal share of about 25,000 metric tons each, the remainder coming from Belgium, France, Italy, and Czechoslovakia. Russians are doing all in their power to capture a large share of the trade, but Yugoslavia is so close to this market that it is difficult for Russian exporters to displace her product.

Prices for Yugoslavian cement vary from \$7 to \$9.28 per ton f.o.b. port of Split, Dalmatia.

In view of the fact that there are no direct means of communication between Canada and Greece, it is doubtful whether the Canadian product can compete with Yugoslavian and Russian cement.

Paper and Wood Pulp

PAPER

Of the several paper mills to be found in Greece, only two are of any importance. However, the industry is steadily increasing its output from year to year. In 1929 local production reached 11,500 metric tons as compared with 9,500 metric tons in 1928. Writing paper, envelopes, paper for registers and account books, wrapping paper, newsprint, and cardboard of a rather inferior grade, comprise the output of the local mills. By keeping a high tariff on many kinds of paper, the Greek Government has sought to allow the national industry to gain a firm footing. However, the industry is not yet able to supply all the country's needs, either in quantity or quality.

Writing Paper.—No separate figures are available with respect to local production of writing paper. This paper is both white and coloured, without a watermark, lined and unlined, and of an inferior grade. The sheets are in the following sizes (in centimetres): 61 by 81, 58 by 86, 63 by 95, 70 by 100, and 75 by 105. Weights are from 50 to 120 grams per square metre. There are no exports.

Annual imports of writing paper into Greece are placed at approximately 2,000 metric tons. The principal sources of supply are Germany, Sweden, Austria, France, and Great Britain. The United States and other countries ship only a limited amount on account of high prices. The better-quality papers find only a small market in Greece, the demand being generally for medium qualities. Except for the higher grades, paper imported into Greece is not watermarked, as watermarked paper is assessed under a higher rate of duty. Thin paper is preferred, since this commodity is dutiable on weight. All imported paper is unruled, owing to the fact that it is subject to a lower rate of duty. Imported paper comes in sheets of the same sizes as those of the locally produced article. Weights preferred range from 50 to 75 grams per square metre.

Besides the imports referred to above, paper for Government use to the extent of 1,500 metric tons per annum is purchased abroad. At present this paper is furnished by a Swedish firm, through their agents in Athens; it bears a watermark denoting that it is for Government use. This paper, which is imported in reams of 150 kilograms or in rolls of 100 kilograms, is quoted at

from \$121.50 to \$131.22 per metric ton c.i.f. Piraeus, payment being made by the Government after delivery. It should be noted that paper when imported for the account of the Government is admitted into Greece free of duty; otherwise, it is dutiable as follows:—

Unlined Writing Paper not Watermarked

Tariff Item No. 179	Maximum Minimum	
	Per 100 Kg. or 220 Lb.	
(b) White or coloured, mat or glossy, made from a mixture of mechanical and chemical pulps. More than 45 centimeters in width, in reams or rolls.		
(1) Up to 40 grams per square metre	\$ 9 65	\$ 6 75
(2) Over 40 grams per square metre	8 68	5 79
(c) White, coloured, or in two colours, mat or glossy, made exclusively from chemical pulps or rags. More than 45 centimeters in width, in reams or rolls.		
(1) Up to 40 grams per square metre	11 58	8 68
(2) Over 40 grams per square metre	9 65	6 75

Watermarked Writing Paper

Tariff Item No. 180	Maximum Minimum	
	Per 100 Kg. or 220 Lb.	
(a) Writing paper, lined, water-marked, and letterheads. (Dutiable on the legal net weight).		
In sheets of a length exceeding 45 centimeters	\$19 30	\$15 44

Surtaxes amount to 75 per cent of the rates of duty mentioned above.

The great obstacle for Canadian exporters is principally in the high tariff rates under which the Canadian product is assessed in comparison with paper coming from France, Germany, Sweden, Austria, Great Britain, and the United States. As for paper for Government use, Canadian prices are not in line with those of the Swedish concern referred to above.

Terms are cash against documents, credit facilities up to four months also being granted. Business is done either through commission agents, well introduced in the paper trade, or direct with wholesalers.

Blotting Paper.—No blotting paper is produced locally. Annual imports are estimated at about 40 metric tons, the principal sources of supply being France, Germany, Italy, Holland, and Great Britain; France and Germany respectively ship about 16 and 8 metric tons. The sizes generally in use are 47 by 60 and 48 by 58 centimetres, weights being from 4, 5, 6 up to 10 kilograms. Only plain white paper is in demand. Prices vary according to quality; anything from 40 pounds sterling per ton c.i.f. Piraeus may be paid. Blotting paper is generally shipped to this market in bales of 500 sheets; marketing methods and terms of payment are the same as for paper.

Duty and Internal Taxes on Blotting Paper

Tariff Item No. 18e	Maximum Minimum	
	Per 100 Kg. or 220 Lb.	
Duty	\$11 58	\$ 7 72
Internal taxes	8 68	5 79
Total in Canadian currency	\$20 26	\$13 51

Newsprint.—Daily newspapers in Greece are numerous, and since the local production of newsprint is negligible, the market for this commodity is a comparatively important one. Annual imports of newsprint amount to approximately 7,000 metric tons. Germany leads with about 4,000 metric tons, followed by Sweden with 1,500 tons, the remainder being credited to Italy, Austria, Belgium, and Holland. Newsprint comes to this market in rolls of from 75 to 86 centimetres in width, the paper weighing approximately 50 grams per square metre. A good average quality of unglazed paper is in demand. All

newsprint coming to the Greek market should bear a continuous watermark at intervals of 5 to 6 centimetres throughout the roll, and it should be unglazed. The regulation in this connection is very rigid, as such paper, after permission for its importation has been secured from the Ministry of National Economy, is admitted into the country free of duty. The watermark is to prevent contraband. Quotations on Swedish newsprint c.i.f. Piraeus are at present 12 pounds sterling per ton: German quotations are slightly lower. Exporters sell through agents who are well known in journalistic circles. Terms are sight drafts at ninety days after the arrival of the steamer, with an option to renew half the amount for a further three months at from 6 to 7 per cent interest.

Wrapping Paper.—Local factories are gradually increasing their output of wrapping paper; it has now reached approximately 30 metric tons daily, and imports are decreasing accordingly. Imports in 1929 were placed at 2,130,006 kilograms as compared with 2,636,853 kilograms in the preceding year. The various countries contributing to this trade in 1929 and the amount shipped by each in kilograms, with the 1928 figures in parentheses, were as follows: Germany, 513,342 (797,857); Czechoslovakia, 498,457 (411,489); Sweden, 436,976 (613,845); Austria, 252,550 (145,503); Belgium, 173,704 (253,573); Italy, 125,819 (103,320); Netherlands, 65,777 (148,726); and Great Britain, 51,317 (39,139). Although of an inferior grade, the locally made wrapping paper sells well as facilities of payment are extended, the trade being conducted on the basis of open accounts. Moreover, its price is slightly lower than that of the imported product. The usual sizes of locally made wrapping paper are 70 by 100 centimetres, weighing from 40 to 50 grams per square metre. Imported wrapping paper is generally shipped to this country in bales weighing from 150 to 200 kilograms, the bales being protected by two thick boards bound with strong wire. The sizes generally in demand are 70 by 100 centimetres, with smaller sizes on special request. Paper weighing from 40 to 42 grams per square metre is preferred, as wrapping paper is dutiable by weight. The M.G. cap paper (sulphite) is in favour, while the demand for kraft is very limited. Quotations c.i.f. Piraeus on German M.G. cap (sulphite), 70 by 100 centimetres, weighing 41 grams per square metre, are around \$92 per metric ton. Foreign manufacturers selling in this market extend credits of three to four months.

Duty and Internal Taxes on Wrapping Paper

Tariff Item No. 178	Maximum	Minimum	Conventional
	Per 100 Kg. or 220 Lb.		
Wrapping paper in sheets or rolls of a width of over 45 centimetres:			
(a) Ordinary paper made of straw, glossy or mat..	\$7 72	\$4 82	
(b) Paper made from chemical or mechanical pulps, rags or used old paper, white or of natural colour or coloured, glossy or mat:			
(1) Over 40 grams per square metre	\$ 68	5 79	
(2) Up to 40 grams per square metre and unfit for cigarette making.. . . .	9 65	6 75	
Wrapping paper in sheets or rolls, of a width of over 40 centimetres:			
(c) Paper made of chemical or mechanical pulps, rags, old used paper, white, of natural colour or coloured, glossy or mat:			
(1) Over 200 and up to 300 grams per square metre			
(2) Over 40 and up to 200 grams per square metre.. . . .			\$4 24
(3) Up to 40 grams per square metre unfit for the manufacture of cigarettes.. . .			5 02
			6 75

Surtaxes amount to 75 per cent of the rates of duty mentioned above.

As wrapping paper from Germany, Sweden, and Czechoslovakia is dutiable under minimum tariff rates, whereas the Canadian product is assessed under maximum rates, Canadian exporters cannot compete at present.

Representation for the Paper Trade.—Trade in all kinds of paper in this market is conducted through agents working on a commission basis, or through wholesalers. An agent with a depot is the best arrangement. For newsprint, the agent should be well introduced among proprietors of newspapers.

WALLPAPER

No wallpaper, except some small quantities of paper in one colour, is produced in Greece, so that all figured paper is imported from abroad. However, imports are limited as the majority of houses have distempered walls, there being a prejudice against the use of wallpaper, which is said to breed insects; only hotels and the larger private houses have papered walls. In some houses some of the rooms might be papered and others distempered, but in general only the better-class Greeks residing in important centres and foreign residents make use of wallpaper. Some small stores and shops in Athens-Piraeus, Salonica, and Patras also have papered walls, but their number is small.

In private houses and hotels sage blue and rose are favourite colours, while fantastic designs and modern cubist effects find no demand. On the other hand, flower motifs are well liked, and plain paper for pasting in panel form is requested by foreign residents. Imitations of leather, silk, damask, and other fabrics, as well as washable glazed papers, are only in small demand. Papers for private houses and hotels are mostly in the medium grades, and for small stores and shops only low-grade papers are required, striking and dark colour schemes being in favour. Thin papers are generally preferred since wallpaper is dutiable on weight.

Great Britain has the bulk of the trade, with France, Germany, Belgium, and Canada sharing in the business to a small extent. Only the good-quality product, for which there is in Greece a rather limited market, is shipped from Canada. The Canadian article is being sold direct to furnishing establishments. In the Athens-Piraeus market other countries sell through a commission agent; in the Salonica market business is usually handled through wholesale paper dealers.

Wallpaper is shipped in rolls of 50 centimetres by 8 metres long. Size and width are not of great importance, although wider papers are preferred to avoid too many joinings.

In view of the fact that low-grade papers form the bulk of the trade, exporters should consider the advisability of introducing such papers into this market along with the higher-grade papers.

Duty and Internal Taxes on Wallpaper

Tariff Item No. 178d	Maximum Per 100 Kg. or 220 Lb.	Minimum Conventional
(1) Under 300 and down to 150 grams per square metre	\$12 54	\$ 9 65
(2) Under 150 grams per square metre	17 37	13 51
(1) Over 200 and up to 300 grams per square metre		\$ 6 75
(2) Over 100 and up to 200 grams per square metre		8 68
(3) Up to 100 grams per square metre		10 61

Surtaxes amount to 75 per cent of the rates of duty mentioned above.

CORRUGATED PAPER BOTTLE WRAPPERS

Straw wrappers only are used by wine merchants, brewers, and manufacturers of aerated water for the distribution of their products in the cities and

in the interior of Greece, the bulk of the Greek wine being sold in casks. Wine is shipped abroad in casks, whilst brandy and liqueurs are shipped in bottles protected by straw wrappers, except in the case of countries in which such wrapping is not allowed. Corrugated paper bottle wrappers are more expensive than straw wrappers, and merchants are reluctant to buy the former unless they are required to do so. Straw wrappers can be had locally at from 46 to 53 cents per 100, whereas strong and thick corrugated paper bottle wrappers, which at the present time come mostly from France, sell at approximately \$1 per 100. Wrappers offered by Canadian manufacturers were quoted at a lower price than the French commodity, but business has not resulted. Merchants in this market are afraid that the Canadian wrappers, on account of their thinness, could not afford adequate protection for the bottles. Some trials might, however, remove these apprehensions.

The usual sizes of bottles used for the export of cognac are the Martell standard sizes; that is, 25 ounces for large bottles and 13 ounces for small bottles.

WOOD PULP

Imports of wood pulp into Greece, which amount to approximately 7,000 metric tons for paper making and 500 metric tons for artificial silk manufacture, comprise bleached sulphite (3,500 metric tons), strong sulphite (1,500 metric tons), and mechanical pulps (2,500 metric tons). Sweden has the bulk of the trade, with small quantities originating in France, Finland, Czechoslovakia, and Germany. Business is effected through commission agents who are well connected with the paper and artificial silk manufacturers. These latter are few, and there are only one or two agents who would be able to work successfully. Credit facilities up to six months are usually granted. Piraeus is the centre for this trade. Recent quotations (c.i.f. Piraeus) from Sweden gave bleached sulphite at £14 10s. (\$70.47) per ton; strong sulphite at £11 10s. (\$55.89); and mechanical pulp at £7 (\$34) to £10 (\$48.60).

Duty and Internal Taxes on Wood Pulp

Tariff Item No. 176B	Maximum Minimum Conventional		
	Per 100 Kg. or 220 Lb.		
Duty	\$ 77	\$ 48	\$ 29
Internal taxes	58	36	22
Total in Canadian currency	\$ 135	\$ 84	\$ 51

Rubber Goods

There are three factories in the Athens district producing various lines of rubber articles, but the exact output of these factories is difficult to estimate. There is no export trade. At the outset, difficulties were experienced in training Greek workers and in getting Greek dealers to take the domestic goods, but owing to an improvement in quality and to cheaper prices and quicker deliveries, as well as to liberal credit terms, these have passed. Raw rubber is brought from England and Holland; old rubber for reconversion is obtained locally.

The domestic factories produce rubber soles and heels in ordinary grey and in red and blue rubber, solid tires for baby carriages, rubber plugs, rings, washers, etc., in all thicknesses and dimensions, rubber bulbs for motor horns, playballs for children in different sizes, matting for automobiles and ships, and

tubing in all dimensions for gas, water, etc., as well as large-diameter rubber hose for various purposes. The quality of the locally produced articles is not, generally speaking, up to the standard of the imported products. In the smaller mechanical lines foreign competition is gradually being met, price being an important factor in this market. Local dealers state that it is becoming increasingly difficult to dispose of imported rubber hose on account of home competition, and only where rubber hose of special quality is required for a specific purpose can the foreign article compete. The production of canvas shoes with rubber soles made by local factories is also having its effect on imports. Where formerly a cheaper variety of canvas shoe with rubber sole was imported, the bulk of the trade has now passed into the hands of the local manufacturers.

TIRES FOR AUTOMOBILES AND TRUCKS

Tires for automobiles and trucks are not manufactured in the country, but there are as many as twenty-eight foreign brands on the Greek market: American, British, Italian, German, Austrian, Belgian, and French. It is estimated that cord, low-pressure, straight-sided tires represent 90 per cent of the imports, the remainder comprising almost exclusively cord, low-pressure tires of the clincher type for the older types of Fords and Chevrolets. Goodyear tires have 40 per cent of the sales, followed by Firestone with 12 per cent, Goodrich with 10 per cent, whilst the remaining 38 per cent are shared by the various other brands in the market, Dunlop tires being quite prominent. The sizes of cord, low-pressure, straight-sided tires for automobiles and trucks in most common demand in this market are:—

Automobile Tires.—In inches: 29 by 4.40, 29 by 5, 30 by 5, 31 by 5.25, 33 by 6. In millimetres: 730 by 130, 820 by 120, 880 by 120, 935 by 135.

Truck Tires.—30 inches by 5 inches, 32 inches by 6 inches.

On the average, 60,000 pneumatic tires, including a small number for trucks, are imported into Greece annually: three tires per annum on an average are required by each car. With improvement in the roads which the Government now has in hand, longer life may be expected from them.

There are nearly 100 heavy passenger buses in Athens, which ply between the city and such points as Kiphissia and Glyfada, etc. These motor buses are practically all of American make. It may be said that there are about seventy such buses using on the rear wheels dual tires, which are separate units, in the descriptions and sizes of cord, low-pressure, straight-sided tires referred to above. Buses using single tires require the 30- by 5-inch and 32- by 6-inch sizes.

On account of restrictions placed by the Greek Government on the use of solid tires, sales are now negligible. Only Pirelli and Goodyear solid tires are to be found in this market. Sizes required are 40 by 10 and 36 by 6 inches. These are mainly used on the trucks which were left in the country by the Allied forces.

Small quantities of semi-pneumatic tires (30 by 5) were imported during the past few years, but they did not prove satisfactory and are no longer in demand.

Tires are usually sent on consignment, the exclusive agents in their turn consigning to sub-agents, who sell to consumers on credit. Tire manufacturers allow an agent $2\frac{1}{2}$ per cent on his purchases to cover the cost of advertising in the daily press and by means of posters. Payment is generally made in the form of four to five months' drafts with interest, often renewable at 6 per cent. Discounts to dealers are usually 30, 10, 5, and $2\frac{1}{2}$ per cent.

TIRES FOR MOTOR CYCLES

Motor cycles for sport or travel have just been introduced into Greece. As the greater number are of English manufacture, they come to this market fitted with Dunlop tires, replacements being mainly in the hands of the Dunlop Rubber Company. Some 300 tires for motor cycles are being sold in the Greek market per annum, 85 per cent of which are straight-sided. The following are the sizes in demand (in inches): straight-sided, 24 by 2 $\frac{1}{4}$, 26 by 2 $\frac{1}{2}$, 26 by 2 $\frac{1}{4}$, 26 by 3, 28 by 3; wired, 25 by 2 $\frac{1}{4}$, 27 by 2 $\frac{3}{4}$, 25 by 3, 27 by 3, 26 by 3 $\frac{1}{4}$, 26 by 3 $\frac{1}{2}$, 28 by 3 $\frac{1}{2}$, 27 by 4. There is no demand for low-pressure tires for motor cycles.

TIRES FOR BICYCLES

There are four different brands of bicycle tires on the Greek market—that is, Michelin (French), Hutchinson (French), Pirelli (Italian), and Dunlop (English). The use of bicycles being confined to the popular class, the question of price is of importance, and French brands, being slightly cheaper, have the preference. It is estimated that about 15,000 bicycle tires are sold annually in Greece. An improvement in the roads is expected to lead to an increase in the use of bicycles as a cheap means of transport.

TRANSMISSION RUBBER BELTING

Up till quite recently transmission rubber belting was unknown in Greece. The usual form of belting was leather or balata, but a start has been made with the equipment of one or two large factories, and on its success depends the prospects for the wider use of transmission rubber belting in this market.

RUBBER CABLE, INSULATED OR NOT

Imports of rubber cable, insulated or not, are mainly for public works, and when for this purpose are admitted free of duty. Sales are in the hands of two large German concerns which specialize in the manufacture of rubber cable.

RUBBER FLOORING

Rubber flooring has recently been introduced into Greece by an English concern, which has secured a contract to lay flooring in the extension of one of the principal hotels in Athens. The work is in the nature of an experiment as well as an advertisement, and the prospects for future business are dependent on the degree of success of this undertaking.

RUBBER HOSE

Quite a considerable proportion of the trade in rubber hose for the use of wine merchants, and for irrigation and garden purposes, is now in the hands of the local industry, which produces this product in all diameters up to 4 inches internal, in two-ply, three-ply, and four-ply. High-pressure hose and hose for special purposes can alone compete with the local product, price being the chief consideration.

RUBBER MATTING FOR AUTOMOBILES

The trade in rubber matting for automobiles is very limited, being chiefly that of replacement for the matting which comes with the equipment of the car. An increasing tendency has been noticed in the Greek market to replace such rubber matting with embossed aluminum strips, which give longer service. European rubber concerns import rubber matting for automobiles in strips, and the local factories also supply a cheap-quality matting.

EBONITE AND VULCANITE ARTICLES

All articles in ebonite are imported from European countries in their finished state, but the trade is negligible. France and Germany are the two principal sources of supply.

The whole of the requirements in ready-made articles in vulcanite such as fountain pens, pencils, radiator caps, and acid-proof pipes are imported; but the market is overstocked with many of these products. All the well-known European and American makes of fountain pens and refill pencils are on sale, besides a quantity of cheaper articles, particularly from Germany, which are sold by hawkers. There is a market for vulcanite fibre sheets, which are at present imported from Germany.

DRUGGISTS' SUNDRIES

The bulk of the trade in druggists' rubber sundries is in the hands of German concerns. These articles are of an inferior grade, but price is of first importance.

SURGICAL RUBBER GOODS

There is a fair demand for imported sprays, syringes, and bulbs, some of which, of an inferior grade, are made locally. There is a limited demand from hospitals and clinics for ice bags and air cushions, all of which are imported. The use of hot-water bottles is also confined to hospitals and clinics. Germany is the chief source of competition for rubber gloves.

BATH SUPPLIES, ETC.

The demand for rubber bath mats is very limited, and is chiefly supplied from domestic sources. The market for rubber sponges is small. None are manufactured locally, but natural sponges are to be had at low prices, as they are found in the Aegean Sea in quantities in excess of local needs.

There is a good demand for rubber bathing caps; they are not produced locally. Imports originate in various European countries such as Germany, France, and Italy, and come in every conceivable colour and design, usually with straps for fastening under the chin and covering the whole of the head and ears. Bathing caps are hawked in the streets of Athens at low prices.

Rubber waist belts are made locally, but the trade is limited as leather belts are principally used in this country. However, rubber belts are used to a small extent with swimming costumes. There are no imports.

Rubber Toys and Novelties.—There is only a limited demand in Greece for rubber toys and novelties. The buying season is in the autumn for sales at Christmas, and they are almost exclusively of German origin. Rubber imitation animals as used in aquatic sports and large multi-coloured playballs have recently been introduced from the United States, but the business is negligible.

FOOTWEAR

Rubber-soled Canvas Shoes.—In recent years the demand in the Greek market for imported canvas shoes with rubber soles has declined. This is due partly to the fact that the domestic factories are turning out a cheap article which takes the bulk of the trade. It is estimated that about 5,000 pairs of rubber-soled canvas shoes are imported annually, principally from the United States. The Canadian product is handicapped by the fact that it is assessed under the maximum rates of duty. A well-known Canadian brand is sold in

this market through London agents to the extent of between 400 and 500 pairs annually; its high price militates against larger sales. Japanese firms have now entered the market with a shoe in close imitation of the American article, but at a lower price, and it should be a strong competitor. Crêpe rubber, however, is now being imported in sheets, and canvas shoes with crêpe rubber soles manufactured by local shoemakers. It should be noted that indoor gymnastic halls do not exist in Greece, and rubber-soled canvas shoes are used only for such outdoor pastimes as tennis, handball, and basketball.

Goloshes.—The demand for goloshes is limited as the climate is dry as a rule. Only in the event of a very wet winter would sales increase to any extent: these would be larger in Salonica than in Athens. The type in general demand for men, women, boys, and girls is the small slip-on in the black colours, with a very restricted trade in brown or beige slip-on for women.

Snow Boots.—There is little or no demand in the Athens market for snow boots. Snow boots are sometimes worn by women during the wet weather in lieu of the usual slip-on goloshes, but to a very small extent. These are usually trimmed with fur. Demand in the Salonica market, although larger, is still negligible.

Heels and Soles.—There is only a small demand in Greece for rubber heels and soles. Except for canvas shoes, rubber soles are not popular in summer. Heels and soles are made locally at about half the price of the imported article, and the trade is mainly in rubber heels. The old type of circular rubber heel is no longer popular. The heels are shaped to the shoe. Imports, which are limited, are almost entirely in the hands of German and Italian concerns.

Agricultural Machinery and Implements

Agriculture is the principal source of revenue in Greece. The monetary and financial problems of the country now seem to have been solved satisfactorily, and the development of agriculture occupies a prominent place in the economic policy of the Government. On the other hand, owing to the large number of refugees from Asia Minor—close on one million—who have been placed on the land, and to the fact that an area of 300,000 hectares is now being reclaimed in Macedonia and Thrace, 11,000 of which will be ready for cultivation this year, agriculture is assuming greater importance from year to year. In 1928 the area under cultivation was 1,590,149 hectares, as compared with 1,520,083 in 1927 and 1,269,028 in 1922-23, when the refugees arrived in Greece. The agricultural regions are Macedonia, Thrace, Thessaly, Epirus, Old Greece, and Peloponnesus, the three first-named being the most important. The principal crops grown in this country are cereals, tobacco, vegetables, cotton, fodder plants, currants, sultanas and grapes, fruit, olives, almonds, and mulberry trees for the silkworm. According to the Greek official statistics, the areas on which the following agricultural products were grown in 1928 were (in hectares): cereals, 138,995; tobacco, 93,076; vegetables, 78,301; fodder plants, 50,794; currants, 197,327; and cotton, 15,404. Improvements have been made in methods of cultivation, and agricultural machinery and implements—the demand for which until comparatively recent years was not of much importance—are in increasing use. As a result of the subdivision of the land into small holdings, the increase of the population, and the keen interest taken by the Government in developing the agricultural resources of the country, the next few years will see the introduction of large quantities of modern machinery and plant. This should be followed by further business when in a few years' time the vast areas in Macedonia and Thrace now being reclaimed become ready for cultivation.

AGRICULTURAL ORGANIZATIONS

The practical steps taken by the Government in their agricultural campaign have so far resulted in the formation of a Colonization Department, experimental agricultural colleges, an agricultural bank which has just begun to operate, and agricultural federations, unions, and co-operative societies. The Colonization Department assists refugees in opening up new areas of arable land, and agricultural colleges have been erected for the purpose of giving technical training to peasants. These colleges are also working in several areas supplying plants, trees, and breeding stock. Since the subdivision of the land, the small landowner has found that he is not financially strong enough to cultivate his land without assistance, and it has therefore been found necessary to form a number of co-operative societies, unions, and federations, and with these the agricultural bank works in conjunction. Each village has its own agricultural co-operative society, of which there are several hundreds in each prefecture (province). The societies are represented in the nearest provincial town by a union, and a group of unions is represented by a federation in centres such as Salonika, Athens, and Patras. The unions and federations act both in an advisory capacity and as buying agents, although the co-operatives also buy direct for their associates. These organizations also act as depositaries and selling agents of crops against which they obtain loans for the peasants from the National Bank pending sale. The co-operatives and unions are of recent creation, and have as yet little experience, so that great caution has to be exercised when dealing with them.

Much useful work has also been done during the last few years to assist in the agricultural development of the country by the International Refugee Settlement Commission.

METHODS OF SELLING

Some manufacturers who now do business in Greece are represented for the whole of the country by a general agent who either has branches in the principal buying centres or has travellers who visit them, but the agents are few who have these organizations. Other manufacturers are represented by an agent, who in turn appoints sub-agents in the different districts, but this method of sale is unsatisfactory owing to high overhead costs. It would therefore be a matter for consideration whether it would not be better to divide Greece into four agencies for the sale of agricultural machinery: Salonika for Macedonia and Thrace, Larissa with the port of Volo for Thessaly, Patras for part of the Peloponnesus, and Athens for the remainder of Greece.

Agricultural machinery can only be sold after it has been displayed, and it is customary to send goods on consignment for payment after sale, but the agent accepts the *del-credere*. Agents' commission from the manufacturer varies from 15 to 20 per cent on list price.

PAYMENT

German, Swedish, and Hungarian firms demand 15 to 20 per cent cash, balance over three harvests. German sales have recently been made for four harvests, but these terms are strongly deprecated locally. British manufacturers ask for from 15 to 20 per cent cash, and the balance in three harvests. Americans generally insist on payment at twelve months, but a few houses accept over two and even three harvests. Extensions are usually granted throughout Greece when there is a failure of crops. Continental houses are as a rule quite generous and even lenient over the matter of credit. When the crops are bad and the farmer finds himself in difficulties, they seem to be more considerate than British and American manufacturers.

BUYING SEASON

The buying season for tractors is August and September; threshers must be on the market by June, and reapers and binders by the end of April. Implements, accessories, and spare parts must be kept permanently in stock.

MARKETS

The principal market for agricultural machinery is Macedonia and Thrace through Salonika. That of Thessaly through Volo is of secondary importance, as the volume of business transacted there is about a quarter of the former. Both these markets, however, show promise of great development in the near future. There is also some business to be done through Athens-Piraeus and Patras.

ARTICLES IN DEMAND

The machinery, implements, and accessories mostly in demand are tractors, threshers, binders, hay-baling machines, maize and corn shellers, ploughs, rakes, picks, hoes, fencing and barbed wire, binder twine, and a small number of cream separators and dairy appliances.

There are in Greece five small establishments manufacturing agricultural plant, the two most important of which are situated at Volo. The agricultural plant manufactured locally consists principally of horse- or bullock-drawn ploughs, harrows, rakes, and pickaxes. As for most of the other articles in demand, Greece has to rely on imports. The two Volo manufacturers referred to above are at the same time the two largest importers, their selling organization being used for both the lines they manufacture and those they import.

TRACTORS

Quite a large number of gasoline tractors are in use, but owing to the present high cost of this commodity, tractors burning heavy oil (without magneto) of from 20, 22, and up to 36 horse-power are now almost exclusively demanded. They are usually sold complete with ploughs and other attachments. The big tractor is used with three ploughs, but the smaller and more economical tractor, which is the more popular, is used with two. The depth of the furrow is from 20 to 25 centimetres. The two-furrow plough attachment must be fitted to take five-disc harrows for sowing. The demand for tractors commenced a few years ago, and the number now at work in the whole of Greece is placed at 330, 200 of which are to be found in Macedonia, 70 in the Thessalian Plain, and 60 in the remainder of Greece. Gasoline tractors mostly sold are the "Deering," "MacCormick," "Fordson," and "Caterpillar," and the heavy oil tractors are those manufactured by Heinrich Lanz, Munktel, and a few by Hart Parr. Some large 60 h.p. "Caterpillar" tractors manufactured by the Caterpillar Tractor Company are employed by companies reclaiming land. There are still a few isolated orders for steam tractors of about 36 h.p.

The price of gasoline is a question that is having the serious attention of the Government and is being studied in conjunction with gasoline-importing concerns. It is proposed to adopt a system somewhat similar to that in force in Turkey, which would permit gasoline for agricultural purposes to be sold at a very reduced price. It is not possible to state at the present time whether such a scheme will go through. In any event, prospects are in favour of crude-oil tractors. Heavy oil now works out at 15 per cent as compared with gasoline.

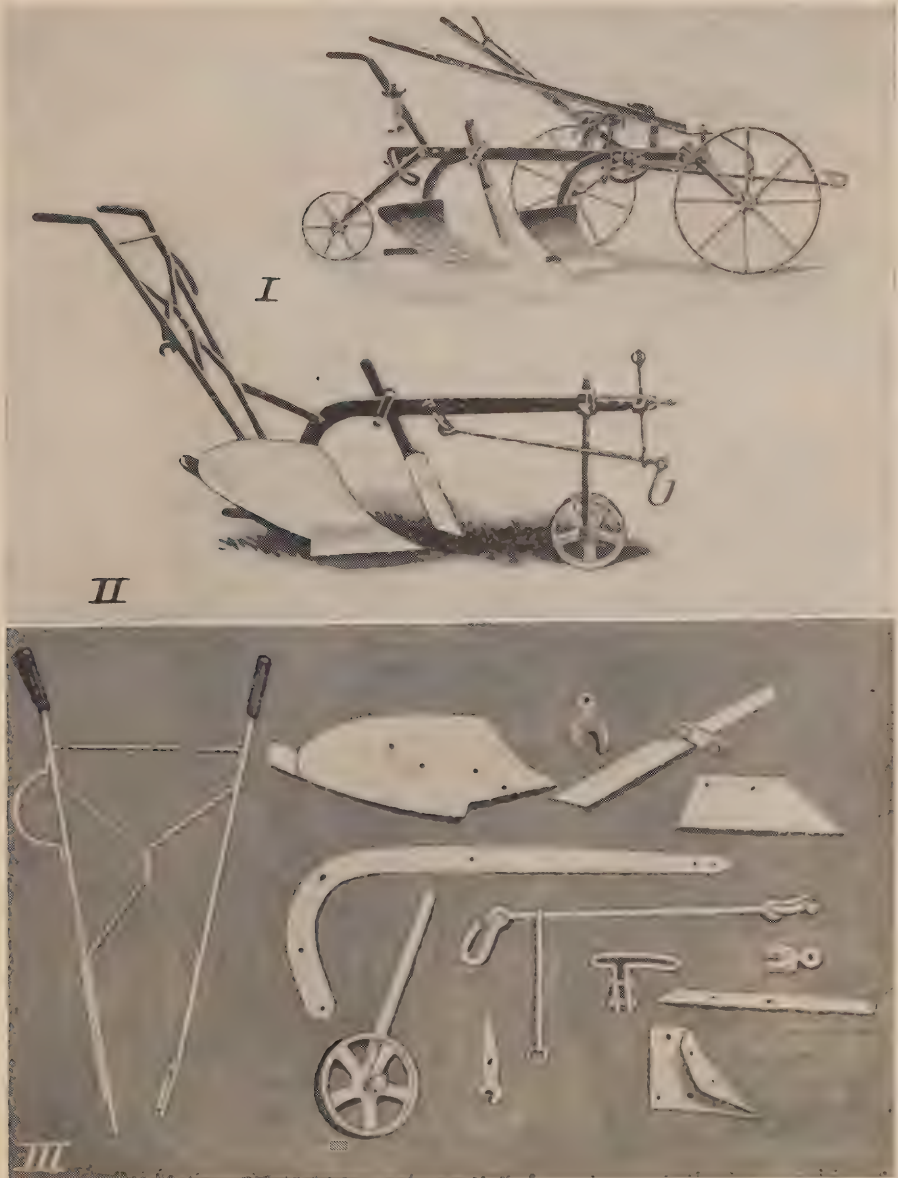
THRESHERS

There is a comparatively large and increasing demand for the standard thrasher with a straw binding and chopping apparatus. Sizes are 30, 36, 42, and even 54 inches, the most popular being the 36-inch and 42-inch. Some 250 threshers can now be sold annually in Macedonia, whilst in Thessaly there is a

market for about 60. The metal thresher was recently introduced into Greece, and seems to be preferred. Marshall (British), Hoffherr-Schranz-Clayton Shuttleworth of Budapest, Heinrich Lanz, Munktel of Sweden, Case, and Ransome are the competitors. There is also some demand for the small Badania thresher.

PLOUGHS

The one- and two-furrow horse- or bullock-drawn ploughs are mostly manufactured in the country. The annual output amounts to approximately 40,000, a certain number of which are exported to the Balkan States and Turkey. These



I, Two-furrow plough; II, One-furrow plough, and III, parts thereof.

ploughs sell at from \$3 to \$5, and it is stated that were they manufactured in the United States they would cost at least \$15. The German type of plough is manufactured by the local industry, its use having proved very satisfactory. It is made of steel, in ten different sizes, as follows:—

Double-handled	20, 24, 28, 32 and 37 kilos.
Single-handled	20 and 24 kilos.
Single-handled, double reversing	28 and 35 kilos.
Two-share	24 kilos.

The most popular size is the 32-kilo, which is due to the fact that most of the regions under cultivation in Greece are hilly.

A small number of horse-drawn Oliver ploughs are being used by refugees, but these are brought with them from Asia Minor.

Tractor ploughs are all articles of import. About 70 per cent of those now in use are of the Deering make, the balance coming mostly from Rudolf Sack and Eckert (Germany), and from the American International Harvester Company. There are also a few Massey Harris and Oliver ploughs. They are fitted with two, three, four, and five harrows, the two and three being most in demand. Weights vary from 70 to 100 kilograms.

REAPERS

There is quite a large market in Greece for reaping machines. Approximately 500 were sold last year in Thessaly alone. Well-known foreign makes are Case, Lanz, Munktel, Frost & Wood, Deering, and McCormick. The last two named have been importing for over twenty years and are very popular. Sizes are 4½ feet and 5 feet.

BINDERS

The sale of binders amounts to about 600 per annum. Horse- and tractor-drawn binders are imported, the former representing by far the larger number. The sizes generally in request are 5, 6, 7, and 8 feet. The 6-foot binder is the most popular. All the 7- and 8-foot machines must be furnished with a tongue truck, and as a rule with outside reel support. The International Harvester, Frost & Wood, Massey Harris, Osborne, Johnston, and Lenz makes are to be found in this market. A few Deutsche Werke have also recently been sold in Greece.

MOWERS

Some mowers are imported into Greece in the following sizes: 3½, 4, 4½, and 5 feet. The 4-foot size has the greatest demand.



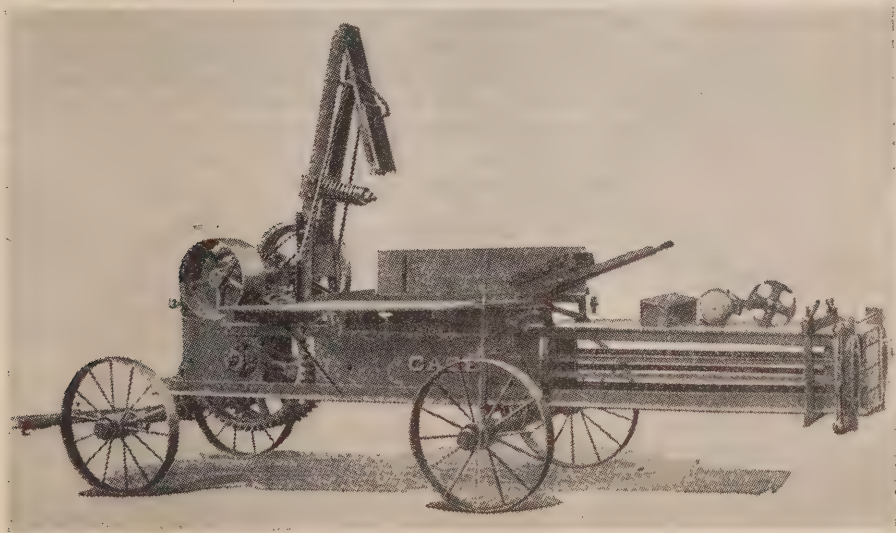
Mower

MAIZE SHELLERS

Both hand and power maize shellers are employed in Greece. The latter have only recently been introduced and they have proved economical. Some 300 hand shellers are sold annually, their capacity being around 6,000 pounds per day. The makes mostly known are International Harvester Company, Flother (German), Hoffherr-Schrantz-Clayton Shuttleworth and Mayfair (Hungarian). Power maize shellers with a capacity of from 30,000 to 60,000 pounds a day are imported, principally by Shuttleworth and a British house.

HAY-BALING MACHINES

The imported hay-baling machines are rapidly replacing the domestic hand-made article, although they cost ten times as much. Several hundreds are in use, and they are mostly American and German. The sizes in demand are 14 inches by 18 inches and 16 inches by 18 inches, generally operated by means of a 6-h.p. gasolene motor. Horse-drawn baling presses are rather rare. The delivered cost of the American product is around \$350.



Power Baling Press which proves to be, a popular type.

DAIRY APPLIANCES

There is not much demand for dairy appliances in Greece. The de Laval cream separator has a small sale. Both motor and hand separators are in the market; capacity from 75, 100, 140, 200, 275, to 375 litres per hour.

INCUBATORS

The demand for incubators is negligible, and those in use are of American manufacture. The few attempts that have been made at poultry farming in this country have met with failure. This is put down to the fact that every small landowner keeps a few chickens which cost him nothing for upkeep, and he is prepared to sell the eggs at low cost. In this way the country demand is supplied. Large towns are catered for by Bulgaria and Turkey, who export to Greece large quantities of eggs.

FENCING AND BARBED WIRE

Mostly supplied by France, Belgium, and Germany, these commodities find increasing sales in Greece.

SUNDRIES

Smaller agricultural implements such as spades, shovels, etc., are manufactured locally, but imports are comparatively important, those of British manufacture being preferred. Binder twine is also manufactured, but imports from the United States and Belgium amount to a relatively high figure.

FUTURE TRADE

The three provinces of Macedonia, Thrace, and Thessaly offer prospects of an important trade in agricultural machinery and implements during the next few years, but any manufacturer who wishes to tackle the business seriously must be prepared in the first instance to send out a technical representative to study conditions, as in order to adapt machinery to local requirements, modifications in design may be necessary. Much disappointment has been caused in the past by supplying unsuitable types of machinery. Competition is very keen in this market; and as an instance of the enterprise shown by foreign firms it may be stated that the German firm of Lanz have started a repair shop in Larissa, where they retain three engineers of their own staff, who travel about the country inspecting machines sold and making the necessary repairs free of charge.

CANADA'S SHARE OF THE TRADE

The Greek imports of agricultural machinery and implements for 1927, 1928, and the eleven months ended November 30, 1929, respectively, amounted to \$214,748, \$742,790, and \$570,456. According to the Greek official statistics, the Dominion's exports to this country for the past three years were valued at \$9,008 (1927), \$37,323 (1928), and \$63,944 (for the whole of 1929), these being detailed as follows:—

Article	1927	1928	1929
Tractor ploughs		\$ 1,158	\$ 5,699
Binders	\$9,008	35,967	6,993
Mowers		132	467
Threshers			50,265
Shellers			320
Hay presses			200
Plough parts		66	....
Total	\$9,008	\$37,323	\$63,944

An analysis of the above table shows that in 1927 Canada exported only binders to Greece, whilst tractor ploughs, mowers and binders were sold in 1928, and thresher, shellers, hay presses, mowers, binders and tractor ploughs in 1929. In the past year's figures, threshers deserve a special mention as they appear for the first time in Canada's exports of agricultural machinery to Greece, representing at the same time over two-thirds of the total sales. A decided decrease was noticed in exports of binders in 1929 as compared with 1928. On the other hand, Canada's total exports reached their highest figure in the past year, showing an advance of \$26,621 over 1928, and of \$54,936 over 1927.

This advance is probably due to the fact that the threshers referred to above were designed for co-operative societies and consequently admitted into Greece duty free, agricultural implements, according to a law which came into force on March 16, 1929, not being subject to the ordinary customs duty when they are purchased on behalf and for the use of co-operative societies. Canadian imple-

ments for private account are dutiable under the maximum tariff rates; the products of the Dominion are not entitled to most-favoured-nation treatment, as are those of some competing countries.

According to the Greek official statistics, exports of agricultural machinery and implements from the United States to Greece for the years 1927 and 1928 and the eleven months ended November 30, 1929, amounted to \$214,748, \$742,790, and \$570,456 respectively. These consisted of binders, mowers, threshers, tractors, tractor ploughs, shellers, accessories and spare parts.

Progress in Greek agriculture is evident, and the imports of agricultural machinery and implements will greatly increase during the next few years. It is to be hoped that Canadian manufacturers will follow closely the development.

A list of firms who might consider representing Canadian manufacturers of agricultural machinery and implements is on file at the Department of Trade and Commerce, Ottawa (file 24536), and may be obtained on application.

Machinery and Electrical Apparatus and Supplies

ROAD-BUILDING MACHINERY

In May, 1928, the Greek Government granted a concession to a firm located in Athens for the construction of from 2,000 to 3,000 kilometres of roads throughout Greece. The concession also covers the repair and widening of many existing roads. The work entails the expenditure of about £6,000,000, and in order to carry it out the company have founded a special section for road-making activities, which includes survey, transport, and finance. English specialists are collaborating with Greek surveyors and workmen in carrying through the work, which has been given out to about twenty Greek sub-contracting companies who are doing the work at a fixed rate per square metre. For the purpose of the scheme the country has been divided into seven sections, and about 17,000 men are being regularly employed.

Various kinds of roads are being built, including macadam, crushed granite, asphalt, and earth roads. The average width of the roads under construction is six metres, with drainage ditches on both sides. In the mountainous regions, in which many of the roads are being constructed, the roads are cut direct in the rock, whilst in places liable to flood they are being laid down on earth embankments of at least 80 cm. in height. Some of the roads subject to heavier traffic and linking main centres will be wider and paved in asphalt. The roads will be slightly wider at corners and crossings, and where a bridge constitutes part of a corner, it also will be built wider. The lack of communications is a severe handicap in the way of road construction in Greece, so much so that in some instances stone material must be transported by mule. Another difficulty is the lack of water during the summer months, often necessitating its transport over long distances. The appropriate stone material is often lacking on the plains and the problem of transport is difficult.

As regards the machinery required, excavators and graders do not seem to be in general use. Much of the work entails the cutting of hard rock; this is being done by pneumatic drills. Stone crushers are used to a small extent, and a number of steam rollers of British manufacture are engaged in the work, but labour is cheap in Greece and much stone is crushed by hand.

Since the work is being carried on in sections by the various sub-contractors, there is no great outlay for up-to-date equipment. Sub-contractors are content to utilize what equipment they already possess, which is often not modern; they apparently have no desire to have expensive equipment on hand for which they may later on have no further use. Catalogues of various Canadian firms have been submitted to the trade, but the Canadian lines of road-building machinery

were rather too advanced in purpose and design for the existing local conditions. However, road contractors are gradually learning the advantages of mechanical methods as against manual labour, even though the latter is comparatively cheap in this country. The market meantime is limited to pneumatic drills, stone crushers, and steam rollers. The soil is unsuitable for the satisfactory operation of graders and other such devices.

FLOOR GRINDING AND SURFACING MACHINES

There is at present little or no market in Greece for floor grinding and surfacing machines. Labour is cheap, and all work to be done on surfacing *terazzo* and marble floors is carried out by hand with old-fashioned and somewhat primitive tools. Owing to the warm climate there are quite a number of stone and *terazzo* floors in this country, but it has been found impossible to sell a single floor grinding and surfacing machine. A German concern has had two types of such machines on the market for over two years, and so far has not disposed of a single unit. The first type comprises a three-phase motor of 1 horse-power, with grinding apparatus constructed from aluminum. The net weight is 136 kilograms. This machine, with accessories, is listed at 577 marks (\$140) f.o.b. Hamburg, including packing.

Another type of German machine offered has a 3 horse-power gasoline motor. Its net weight is 115 kilograms, and it is listed without accessories at 900 marks (\$219), and with accessories at 1,050 marks (\$252), f.o.b. Hamburg, packing included.

So long as labour remains cheap in Greece there will be little or no demand for such modern equipment. Besides, many of the small artisans who undertake floor grinding and surfacing work are not in a position to pay for such equipment.

POWER LAUNDRY MACHINERY

Owing to cheap labour, the use of power laundry machinery is strictly limited. The small demand that exists is filled by German firms, who extend long credit terms of one year or more.

PRESSES FOR MEN'S GARMENTS

There are a great number of dry cleaning and dyeing shops in Athens and Salonica, but very few possess modern machinery. The machinery in general use consists of a small extractor and a garment press fitted with a gasoline-burning boiler; the former is manufactured locally, while the latter is supplied mostly by the United States. The market for modern dry-cleaning machinery is thus restricted.

WINDMILLS AND WATER PUMPS

It is estimated that annual imports of windmills into Greece amount to 50 units. However, the building of private villas is increasing at Phaleron, on the seacoast near Athens, and at Kiphissia, which is an inland resort. Most of these villas have their own well and windmill, and the demand for these machines is increasing.

Windmills as required in Greece should have a tower from 40 to 50 feet high, with a wheel of from 8 to 10 feet in diameter; occasionally wheels of 12, 14, or 16 feet are demanded. The tower should be built to withstand high winds.

Nearly all windmills sold in the Greek market come from the United States, the following being the principal brands: Aeromotor, Samson, Star, and Oilmatio. The cheaper types are preferred. Quotations f.o.b. New York on American windmills are as follows: 8-foot wheel and 40-foot tower, \$117; 10-foot wheel and 40-foot tower, \$136; and 12-foot wheel and 40-foot tower,

\$182. A few "Toronto" types of windmills (Canadian) were imported last year, but owing to the higher rates of duty at which they were assessed they were unable to compete against the American product.

Annual imports of water pumps (windmill, power, or hand) are placed at about 450 metric tons, the United States taking the larger share of the trade, with Germany, France, Great Britain, and Italy doing a reasonable amount of business.

PORTABLE GRAMOPHONES AND GRAMOPHONE MOTORS

The market for gramophones of all sorts is at present somewhat overstocked. Owing to the limited use at present being made of radio sets, the gramophone has been in good demand, a considerable impetus having been given to the trade by the fact that records are now being reproduced in the Greek language. The demand for gramophones, however, quickly led to a local industry being started. Motors and accessories are imported separately and cabinets and cases manufactured locally; the complete article is sold at a lower figure than the imported machine. The bulk of the trade is in portable gramophones. The more expensive types of machine covered with real leather have limited sales, the cheaper models covered with imitation leather or cloth being more in demand. Nearly all the well-known makes are on the market.

For the better-quality machines the United States and Great Britain are the sources of supply, while the various cheap machines, together with many of the single- and double-spring motors and accessories, which are imported separately to be assembled locally, come from Switzerland and Germany. Portable gramophones assembled locally sell retail at prices varying from \$12.50 to \$23.75 with single-spring motors, and from \$25 to \$32.25 with double-spring motors.

Of foreign makes of portable gramophone a leather de luxe model, with a mica sound box and automatic stopper, sells at \$46 and another portable model, best finish leather, at approximately \$49. These are two of the more expensive types, but a portable model is being sold as low as \$15.75. This is covered with camera cloth with a single-spring motor.

There is practically no market for power amplified gramophones. American makers have tried, with but small success, to introduce this line.

The demand for portable and other gramophones in the Greek market will fall off somewhat as soon as a local broadcasting station is opened.

Duties on gramophones and parts entering the Greek market are as follows: 30 per cent ad valorem under the maximum tariff, 20 per cent under the minimum, and 15 per cent under the conventional rate. In addition, surtaxes are equal to 75 per cent of these rates of duty.

AUTOMOBILE BATTERIES

Motor vehicle traffic has been for the past few years developing steadily in Greece, and the Government is carrying out quite an extensive program of road-building and improvement. The number of motor vehicles—private, public, and commercial—in use in Greece is close on 25,000. This gives an idea of the present requirements of this market in automobile batteries. The locally-made battery "Pak," which at one time enjoyed great popularity and rendered sales of foreign makes difficult, has now lost ground on account of its inferior quality. About 50 per cent of the automobile batteries are imported, principally from the United States, France, Germany, and Great Britain; the United States contributes approximately 70 per cent of the total. Sources of imports of motor vehicles are the United States, Germany, France, Italy, Belgium and Great Britain. As about 80 per cent of the imports are from the United States (principally Chevrolets and Fords), it goes without saying that Canadian batteries

are perfectly suited for this market. The types particularly in demand are in the following descriptions:—

Volts	Amperes	Size
6..	95	Standard
6..	120	Standard
12..	60	Standard

The Universal (American) seems to be the best seller, together with the National (also American). The 6-volt 95-ampere battery is reported to represent the bulk of the trade done by the National, whilst the 6-volt 120-ampere battery is the most popular Universal.

Concerns from abroad generally deal through commission agents. Terms usually extended are from 90 to 180 days. Entry duties amount to 10 per cent ad valorem in the case of non-treaty countries and to 5 per cent ad valorem for countries entitled to most-favoured-nation treatment, Canada belonging to the former and the United States, Germany, France, and Great Britain to the latter. An amount equal to 75 per cent of the basic duty must be added for internal taxes.

In order to secure for themselves a share of the Greek trade, Canadian batteries must be of as high a grade as those from the United States, and their price as low, due consideration being given to the difference of 5 per cent ad valorem on entry duty.

ELECTRIC BATTERIES

Batteries for Electric Supply Stations.—Athens and Piraeus are supplied with electric power and lighting by a number of small privately owned concerns and by an Anglo-Franco-Greek company—the Power and Traction Finance Company Limited. The Société Hellénique d'Electricité operates in all the other large towns in Greece. The use of secondary batteries by these concerns is unimportant, as in most cases alternating current is used, and the use of batteries becomes technically difficult and expensive. The tendency has been to dispense with the batteries and to improve the reliability of the supply in other ways.

Batteries for Country House and Farm Lighting Sets.—Although Greece should be suitable for the installation of such sets, the demand is low, principally owing to the lack of technical knowledge among the people in the country districts. A firm in Piraeus, who hold the Lister agency (British) for Greece, have installed a small number of Lister lighting sets. These have proved satisfactory, although they are admittedly dearer than other foreign makes. The American "Delcolite" have sold about 350 plants, principally to small country hotels, restaurants, and farm houses. These batteries have a capacity of 80 and 160 ampere hours. They are gradually being replaced by small crude oil engines.

Wireless Accumulators.—The demand for accumulators for wireless sets is small. At the present time there is no local broadcasting station, and owing to local atmospheric conditions reception from abroad can only be obtained with the most costly sets. However, it is believed that a local broadcasting station will be erected during the next twelve months by the Marconi company, and this will place wireless within the reach of the public. Local firms already engaged in the sale of accumulators are more likely to get the business than newcomers. The Tudor, Voskirk, Warta, and Tudor Français accumulators are principally sold throughout the country. The Tudor 4-volt accumulators of 20, 40, and 80 amperes and the 80-volt 2 amperes cost retail respectively drachmae 275 (\$3.66), 475 (\$6.33), 750 (\$10), and 1,250 (\$16.66). The price to the agent, including landing charges, is approximately 35 per cent less.

Canadian accumulators are too high in price to be competitive.

Hand and Pocket Lamps.—The demand for hand and pocket lamps begins in October and ends in March. Orders are normally placed in September, and any stocks left over at the end of March are a dead loss. Prompt delivery is essential in order to meet the demand in October and to secure as little deterioration as possible in transit. The annual sales are estimated at between 250,000 and 500,000 for the whole of Greece, but no precise statistics are issued by the Ministry of National Economy and these figures may be exaggerated. Sales have been steadily increasing, especially since the influx of refugees in 1922. These refugees, seldom having electric light in their settlements, use large quantities of batteries. However, as electric current supplies increase the demand from these quarters will slacken. Germany, Denmark, and Belgium are the chief exporters of batteries to Greece. Italian batteries are not considered good and only a small percentage are sold in Athens and Salonica: British and Canadian batteries are not on the market. Cordesia and Daimon batteries are imported in large quantities from Berlin direct to the retailer; they are of second quality, but cheap, and therefore command good sales. The price of the common small rectangular battery is about drachmae 6 (8 cents) wholesale, while cylinder types are slightly higher in price.

Primary Batteries (Dry) for Telegraph and Telephone Systems.—The telegraphs and telephones in Greece are State-owned. At present there are telephone exchanges in Athens, Piraeus, Salonica, Patras, and Calamata, but the organization is being gradually extended by the building of trunk lines. The cells at present in use are Leclanche and Collaud.

A concession for the exploitation of the Greek telephone system was recently acquired by a Berlin firm, so that probably all the telephone exchanges will be supplied with batteries and cells of German manufacture. On the other hand, all the equipment required by the Eastern Telegraph Company is secured in the United Kingdom.

There are now several small local firms making $1\frac{1}{2}$ -volt dry cells, the principal one being in Crete. The quality is good, and in addition they are cheap and always fresh. The Cretan firm supplies the requirements of the Ministry of Communications at a price varying between drachmae 13 (17 cents) and 14 (18 cents). No imported dry cell costs less than drachmae 20 (26 cents) c.i.f. Greek ports, exclusive of import duty. A lack of capital and a general inability to profitably organize manufacture on a large scale prevent the Greek manufacturers from expanding and completely monopolising the market. Foreign makers, other than British, are well represented.

The Americans supply the better-class brands such as Columbia and Burgess. These cost drachmae 26 (35 cents) to 27 (36 cents) c.i.f. Greek ports, and sell to the customer at drachmae 40 (53 cents), 45 (60 cents), or even 50 (66 cents), the price varying with the dealer and according to the type of customer. The German Siemens is sold at a slightly higher price. There are a few other cheaper German makes selling to compete with the local products from drachmae 30 (40 cents) upwards. A special Siemens model, which can be "refreshed" by the addition of water, costs roughly 20 per cent more and does not meet with great success.

STREET LIGHTING EQUIPMENT

The market in Greece for street lighting equipment cannot be definitely estimated, as it depends entirely on municipal authorities wishing to renovate their equipment or bring it more up-to-date. Tenders are invited from time to time and Canadian firms selling street lighting equipment, who wish to enter this market, should appoint an agent, preferably one who is well introduced in municipal circles, to look after their interests as occasion arises.

Equipment designed for municipalities is admitted into the country free of duty.

ELECTRIC FURNACES AND HEATING UNITS

There is at present no demand in Greece for electric furnaces. Quite apart from the high cost and inefficient supply of electricity, there exist no smelting furnaces where such equipment could be utilized. The lack of a uniform current, the high cost of electricity, and cheap labour militate against the use of electric heating units for domestic and industrial purposes.

HOUSEHOLD ELECTRIC APPLIANCES AND FITTINGS

Negotiations have started for the development of the hydraulic forces of Greece by an American group, whilst steps are being taken to centralize distribution and reduce the cost of current. If these proposed schemes have a successful outcome, trade prospects for household electric appliances and fittings will eventually be better. However, the safety regulations will still remain in the way. These are based on German standards, being practically a copy of those issued by the German Electrical Union, and a lot of Canadian and American equipment would not conform to the regulations. Two important German concerns manufacturing household electrical appliances have had their own depots in Athens and Salonica for a few years. They have made a careful survey of the market, are thoroughly conversant with its requirements, and sell at low prices.

Germany is at present the chief source of supply for household electric appliances and fittings required by the Greek market, but imports are not large. The principal brands of appliances and fittings in the Greek market are A.E.G. and Siemens (German), Therma (Swiss), Assayer (Swedish), Solcal (French), Marelli (Italian), and Westinghouse and Bryant (American).

Electric Ranges.—This article is practically unknown in Greece, the cost of current precluding all but the wealthy from using it.

Washers.—Except in the two large modern power laundry plants existing in Greece, no electric washers are used.

Floor Polishers and Vacuum Cleaners.—There is only a limited demand for electric floor polishers for attachment to vacuum cleaners. German concerns are stocking this line on a small scale in case of any possible demand. Most of the floor polishers sold in Greece are of the Hobby brand (A.E.G.). It is estimated that there are about 100 vacuum cleaners, mainly of German origin, in use throughout Greece. Some American brands are also to be found in the market. Sales of German vacuum cleaners were recently increased after the visit of a special representative of a German concern who travelled through the country giving demonstrations. The cost of electric current again confines the use of vacuum cleaners to the richer people. The most popular brand is the Vampyr (A.E.G. Co.).

Refrigerators.—The Kelvinator and Frigidaire are in the Greek market, but not much success has so far been met. If less expensive electric refrigerators were offered to the trade a certain amount of business would probably be done with confectioners' establishments, restaurants, the larger hotels, fish markets, and butchers' shops. The type of refrigerator which would find a demand must be of a small compact kind, using not too much water and with a low operating cost.

Pedestal Heaters and Room Stoves.—About fifty pedestal heaters and room stoves are said to be in use in the city of Athens, and they are all of the smaller type. The climate of Greece is not as a rule so cold as to make these articles absolutely necessary. Pedestal heaters and room stoves are practically all sold by the A.E.G. company.

Electric Irons.—Electric irons have a fair sale in Greece. Last year the A.E.G. company disposed of about 500; the Westinghouse company over 100; and the Swiss Therma company was able to sell a small number. The A.E.G. company's irons sell at about \$3.70 retail.

Hot Plates.—Hot plates are still regarded in this field as an article of luxury, and sales are limited. Some German, American, and Swiss makes are in the market.

Kettles, Toasters, and Percolators.—There are only limited sales of electric kettles in Greece. This article is sold principally by German firms. Electric toasters do not command big sales. This article is demanded practically exclusively by foreign residents, as toast is not common among the Greeks. The trade is in the hands of the A.E.G. and the Therma companies. There is no demand for percolators in the Greek market, as all coffee is prepared after the Turkish style.

Fans.—Owing to the warm climate and oppressive heat in the city of Athens during the summer months, electric fans command the largest sale of all electrical equipment. Fans are in general use in hotels, offices, stores, and private houses. A number of brands from Germany, the United States, France, and Italy are to be found in the market. Both oscillating and stationary fans, for 110-volt direct and 220-volt alternating current, are in demand.

Duty and Internal Taxes on Electric Fans

Tariff Item No. 134a	Maximum	Minimum
	Per 100 Kg. or 220 Lb.	
Duty	\$28 95	\$19 30
Internal taxes	21 71	14 48
Total in Canadian currency	\$50 66	\$33 78

Electrical Fittings.—Germany, France, and the United States are the chief sources of supply for electrical fittings coming to the Greek market. The United States formerly had the larger share of the trade, but owing to the introduction of new safety regulations based on German standards much American equipment is no longer accepted. Price is also an important factor. About 75 per cent of the equipment at present on the Greek market is of German origin. Equipment of the American Standards Association has little chance to compete until the safety regulations are altered.

Sockets are of the normal Edison type for non-accessible lamps, and for all other cases of the bayonet type. The bayonet type are recommended for kitchens and damp rooms. Fuses are usually exposed and mounted on a marble slab. Wiring is concealed in tubes of the Bergmann type. Iron conduits are specified for wet places, but they must be lined with paper. Insulating bands are not permitted as lining for tubes, and the wiring employed usually conforms to the specifications of the German Union. Wires and cables are of 600 Ohms/km.

Marketing Methods.—For the marketing of household electrical appliances and small motors and dynamos it is usual to appoint an agent who holds a stock on consignment. The agent deposits a bank guarantee and makes settlement in accordance with terms arranged with the firm. German competitors have their own depots in Athens and Salonica and sell either direct to the customer or to dealers.

HIGH-TENSION APPARATUS, MOTORS, DYNAMOS, AND TRANSFORMERS

The market for high-tension apparatus, motors, dynamos, and transformers is at present stagnant. Prospects depend on the more regular and efficient supply of a cheaper current, and on an improvement in general economic conditions.

RADIO SETS

Until a broadcasting station is opened in this country the possession of radio sets will not become general, as the mass of the population cannot afford expensive sets. There are about 400 sets in use which, as a rule, are not of the powerful expensive type. The opening of a station in Greece will lead to the sale of smaller sets capable of picking up the local station; the tendency will then be for agents to import the parts separately and to assemble the radio sets in Greece. By this method heavy customs duties will be avoided, as complete sets are assessed under high rates. Boxes and containers for such small sets will be manufactured locally.

Holland, Germany, France, and the United States are the chief sources of supply for radio equipment in Greece.

In order to sell radio equipment in this market it is necessary to appoint an agent with a store where the sets can be displayed and tried out. The agent would deposit a bank guarantee and a stock should be sent him on consignment.

POWER AMPLIFIERS

A few power amplifiers have been disposed of to proprietors of cafés and theatres in Athens and in some of the provincial towns, but the market is limited. These are used for amplifying the music from an orchestra or gramophone, or from a radio receiving set. The United States is the chief source of supply.

SOUND-FILM EQUIPMENT

Only two of the very largest cinemas in Athens are at present equipped for talking motion pictures, all the equipment being of American make. There are a few other cinemas equipped for sound films, but the large majority of the small cinemas throughout the country are still showing silent films.

Aircraft, Motor Vehicles and Seacraft

AIRCRAFT

The three aircraft companies at present operating in Greece are the Soc. An. Aero Espresso Italiana, Imperial Airways Limited (British) and Air Union (French). A local concern, known as the Icaros Company, proposes to start operating with the next six months between various centres in Greece and to establish regular connections with the islands. This new company is to be subsidized by the Government. The routes of the Aero Espresso are Brindisi-Patras-Athens, Athens-Mitylene-Constantinople, and Athens-Syra-Rhodes; the route of the Imperial Airways is London-Salonica-Athens-Crete-India; and the Air Union operates between Marseilles-Corfu-Crete-Beirut.

It is not thought that rapid strides will be made in commercial aviation in Greece for some time. At present there is a complete lack of good landing grounds and flying is somewhat bumpy owing to the prevalence of mountains and the upward air currents. There are not many open fields with a smooth enough surface where emergency landings can be made with any degree of safety. A pilot finding himself in difficulties has the choice of coming down in the sea or of trusting to a landing on rocky soil or country covered with short scrub. For this reason Greece will probably develop into a seaplane country, and the question of landing grounds and aerodromes for commercial aviation will be second to the building of good roads from interior towns to the nearest seaplane port. Apart from the absence of landing grounds, there are not many towns in Greece far from the sea, and provided good roads are made from the towns to the nearest seaplane station, flying should develop along these lines.

The relatively high cost of commercial aviation and the lack of good mechanics and engineers make the development difficult. The Army and Navy have trained men, but at present the number available for civil aviation is not large. Also Greece contains only a population of about 6,000,000 inhabitants, few of whom have the means to make use of aeroplanes.

Distances are small, and when the Government's scheme of road building is completed land communication will be easier. There is a regular train service between the two principal cities of Salonica and Athens, and it is thought that unless local business men or foreign tourists use the services, there will be little passenger traffic. Mail and freight will probably make greater use of any internal air service.

A movement has been set on foot for the formation of an aero club and the committee has already been nominated. The object of this club will be to encourage civil aviation. It is reported that the Air Ministry has promised to give every support, such as permitting the members of the club to utilize the State aerodromes, and the importation of aircraft free of duty. Furthermore, the members of the club who qualify for flying service will be granted certain concessions in respect of military service. It is possible that the Government will even give financial assistance to a certain extent. The club will also try to cultivate air-mindedness among the public by the press and other means. Efforts are being made to get this club to adopt the Moth type of light aeroplane for its standard training machine, and to secure the services of a British instructor and British ground engineer.

Progress is being made in naval and military aviation. For the naval services British models are given the preference, while for military aviation French types are predominant. It is thought that seaplanes will become of more general use owing to the extended coastline of Greece. The principal types of machines used by the army are the French makes Breguet 19 and Morane, while in the navy the following British makes are in favour: Avio, training machines; Blackburne Velos, seaplanes; Blackburne Atlas; and Horsley-Hawker Condor.

For the manufacture of aircraft in Greece, the Blackburne Aeroplane and Motor Company Limited, an English concern, have a factory at Old Phaleron, five kilometres from Athens and on Phaleron Bay, where the seaplanes of the two foreign companies operating services over Greece make their landings. The factory buildings and the land belong to the Greek Government and have been equipped at Government expense, the company having an agreement with the Government to build any type of aircraft required. This agreement ended in June this year and has been temporarily extended until December 31, 1930. Efforts are being made by the company to obtain a renewal of the agreement for a further number of years. The control of this factory is of considerable importance as a means of influencing the Government as to types of aircraft and aero engines. The factory workmen are mainly Greek, but the directorate is English. The company do not build engines, as these are ordered on the advice of Greek experts from foreign countries. The Blackburne Company build the aircraft to the specifications supplied them, although these do not vary much from the types of machine employed by the British. They construct planes of the Atlas and Velos type and foreign engines are then built into the machines. The Greek Government also imports aircraft, and orders were recently passed for six English Horsley-Hawker bombing machines.

At the present moment the possibilities are confined to naval and military aviation, which are dependent on the sums allotted in the Greek budget. Owing to the fact that a French military mission advises the Greek Government in military matters, French machines have a preference in military aviation; and as a British naval mission furnishes advice on naval matters, British machines or types are given preference in that service. The program of the present

Government is to reorganize and reinforce the military air force to an important extent, and the necessary finance has been provided, if not for the execution of the whole program in view, at least for the greater part within the next three years. A small proportion of the new aircraft to be acquired will probably be constructed at the Phaleron factory, but by far the greater part will be purchased from abroad. It is difficult to say with any certainty as to what types will finally be decided upon, as many foreign countries are competing keenly for the preference. It seems certain that British types will prevail in the case of the naval service and probably French machines in the army branch. Every effort, however, is being made to prevail upon the army to include at least a proportion of British aircraft in their purchases.

MOTOR VEHICLES

The market for motor vehicles in Greece is at present stagnant, owing to the present economic crisis and to the fact that heavy sales in 1929 appear to have brought the market to saturation point.

There are estimated to be about 20,000 motor vehicles, both passenger and freight, including buses, at present in operation throughout Greece. During the last two or three years about 3,500 motor vehicles were sold annually, but sales have now fallen. It is considered that about 10 per cent of replacement—that is from 1,700 to 1,800 motor vehicles—may be expected this year (1930). A brisker demand is expected when the present Government road-making schemes are completed.

Passenger Cars.—Of the motor vehicles in operation, about 35 per cent are said to be Ford cars and about 25 per cent Chevrolet. The Nash, Essex, and Chrysler are also to be found. Other brands in the market comprise Morris (British), Renault (French), Fiat (Italian), and Buick (American). Five-passenger closed cars are preferred for the larger towns, whilst the open touring model is more in demand in the Peloponnesus and in Macedonia. American cars predominate in this market; they are more suitable to the rough condition of the roads of Greece than most other foreign makes. A large proportion of the passenger cars in Greece are operated as taxi-cabs.

Foreign car manufacturers sell in the Greek market through agents who purchase from the factory and sell direct to consumers or through sub-agents. Sales to consumers are generally made by an initial payment of a certain percentage of the value of the car, the balance being paid in monthly instalments. Payment to the manufacturer is generally made against documents, although there exist financial corporations who undertake payment to the factory on behalf of the purchaser and extend credit to the latter at a high rate of interest.

Cars imported into Greece come boxed from New York on direct steamers, with the exception of General Motors Company's automobiles, which are supplied direct from the Antwerp stock by railway. The Ford Motor Company has a concession for a free zone in the port of Constantinople, and Ford cars are to be supplied from this assembling plant on special steamers, unboxed and ready for use.

Freight Automobiles.—About 20 per cent of the imports of motor vehicles are estimated to be chassis for trucks and motor buses, the majority being Fords and Chevrolets. Other makes in the market are Reo, Dodge, Stewart and Brockway. One and one-half ton trucks are mostly in demand, but two and two and one-half ton trucks are also imported to a limited extent. Owing to the comparatively heavy duties on trucks, the chassis are imported and bodies are built locally. The same remark applies to many of the smaller types of buses in use in this country.

Duty on Passenger Automobiles

Tariff Item No. 266b—	Maximum Per 100 Kg. or 220 Lb.	Minimum	Conventional
Duty (up to 800 kg.)	\$ 9 65	\$ 5 79	\$ 5 79
Internal taxes	7 24	4 34	4 34
Total in Canadian currency . . .	\$16 89	\$10 13	\$10 13
Duty (over 800 Kg.)	\$13 51	\$ 9 65	\$ 9 65
Internal taxes	11 13	7 24	7 24
Total in Canadian currency . . .	\$24 64	\$16 89	\$16 89

Duty on Freight Automobiles

Tariff Item No. 266a—	Maximum Per 100 Kg. or 220 Lb.	Minimum	Conventional
Duty	\$ 3 86	\$ 1 93	\$ 1 93
Internal taxes	2 89	1 44	1 44
Total in Canadian currency . . .	\$6 75	\$ 3 37	\$ 3 37

AUTOMOBILE ACCESSORIES AND SPARE PARTS

There is a good market in Greece for automobile accessories; at present the larger part come from the United States. However, German manufacturers have commenced to introduce many cheap lines and, as price is an important factor with the drivers and owners of many of the cars operated as taxi-cabs, it is expected that much of the trade in accessories will gradually be taken by German manufacturers. Nevertheless, many of the spare parts are replaceable only by the American manufacturers.

Accessories include a wide range such as tail and dash lamps, head lamps, pumps, clutch facings, sockets and switches, jacks, clamps and bolts.

The spare parts in greatest demand comprise springs, pistons, piston pins, piston rings, connecting rods, differential pinion and gears, transmission gears and shafts, drive and axle shafts.

PLEASURE AND COMMERCIAL CRAFT

There is practically no demand in Greece for pleasure motor craft, the main reason being that Greeks do not indulge in nautical sports. As for ordinary fishing boats and canoes, they are being built locally.

Most of the commercial craft to be found in Greece is bought second-hand. From time to time, however, customs and harbour authorities invite tenders for the supply of new boats, particularly coastguard motor boats. Last year tenders were called and many foreign firms, including British, French, German, and Austrian, made offers. Finally, the order was passed to the Austrian house Ganz & Company, their quotations being 40 per cent lower than those submitted by British concerns. Competition is very keen, and it seems quite useless for either American or Canadian houses to endeavour to enter the market.

Sports Goods

Tennis Balls.—Practically all the tennis balls imported into Greece originate in England, the three brands of "Dunlop," "Slazenger," and "Spalding" being the chief in demand. Increases in the sales of one particular brand are noticeable if it happens to be used in play in the Davis Cup tournament. Tennis is, however, not yet a sport largely entered into by the mass of the Greek public, and imports of balls are limited.

Football Bladders.—Football is the most popular sport in Greece, and there is a good market for rubber football bladders. These are imported from Germany, Italy, and England. Competition is keen.

Football.—Association football, which has made great strides in the course of the last five years, is the most popular sport in Greece, and both Salonica and Athens have their city teams. Play is not confined to games between Greek teams. Teams from Alexandria (Egypt), Constantinople (Greek), and the Balkan States visit the country, or Greek teams go to play in Egypt, Turkey, and the Balkan States. Football covers needed by Greek teams are for the larger part made locally. The Greek leather workers can be depended upon to make football covers of strong and efficient design suitable for most purposes. Only when an important match is to be played is an imported ball used (imports are from Great Britain, Germany, and Austria), and often such a ball will be presented free by a German firm desiring to advertise its articles. The footballs used in first-class matches in Greece are of International standard.

Rugby football is at present unknown in Greece.

Handball.—Handball, owing to the fact that very little equipment is needed, is the sport next in favour (after football) in Greece. The ball used is an ordinary football, and as it is not allowed to be touched with the foot it lasts much longer. The only other equipment needed in this game is a rope stretched between two posts, the players being dressed in running shorts and shoes. A championship is held, and although it does not draw the same crowds as football, it is popular.

Basketball.—Basketball is played on a small scale. Being a game usually played indoors in winter in a gymnastic hall, it has not made much progress in Greece: indoor gymnastic halls are unknown in the country.

Swimming.—There are no indoor freshwater swimming basins in Greece. Sea bathing is most popular, and the climate permits the sport to commence early in May and to last to the end of September: some people, particularly foreigners, indulge in sea bathing the whole year round. Swimming costumes of all qualities were formerly imported into Greece. Germany supplied cheap cotton swimming suits and England imported woollen bathing suits. The "Jantzen" and "Bradley" types of expensive woollen bathing and sun-bathing suits then made their appearance. Their cost greatly restricted sales, but the designs were copied by German manufacturers in cheaper woollen and cotton materials, and good sales were made. A local industry has now been commenced, and woollen bathing suits in all designs and colours are now obtainable at much lower prices than the imported article. One or two of the more expensive types of bathing suit have a limited clientele. There is every prospect that the local article will take a considerable amount of trade in cheap cotton suits, as well as some of the business in imported woollen articles, as the latter sell at from drs.500 (\$6.50) to drs.700 (\$9), whereas the close imitation locally made article of inferior quality sell as drs.400 (\$5.25) at the maximum. German bathing suits with about 10 per cent cotton mixture sell at from \$27.21 to \$27.94 per dozen c.i.f. Piraeus, including commission of 5 per cent.

Aquatic Sports Articles.—Balls for the playing of water polo are imported from Germany to a small extent, but for other aquatic sport articles such as surf-riding boards, motor-boat trailing boards, etc., there is at present no demand.

Boxing.—Boxing is indulged in to a small extent in Greece. One or two athletic clubs encourage the sport and meetings on a small scale are sometimes held, when a champion from Turkey or one of the Balkan States may be engaged to fight a Greek champion. Boxing meetings on a large scale are, however, unknown. There is at present only a limited demand for boxing equipment

such as gloves, shoes, punching bags, balls, etc. Supplies are chiefly from Germany, with England and France also contributing.

Rowing.—Sculling and freshwater rowing are little practised in Greece. There are few rivers or inland lakes suitable for the pastime, and there is at present only one small club devoted to rowing. Rowing takes place on the sea in some of the more sheltered bays in which the country abounds, but not to any great extent. There is practically no market in Greece at present for sculling boats or sculls, and any introduction of this sport would quickly lead to local joiners and carpenters building boats in close imitation and adapted to any special local needs. Canoeing cannot be indulged in as the canoes would not be suitable for the open sea. Yachting in small yachts is a sport which is likely to become popular in Greece: a club has recently been formed with its headquarters at Glyfada, a popular resort near Athens. Local builders will, however, be capable of turning out anything required in this line. In any case, it will not be a sport for the masses.

Hockey.—Hockey is confined to one club in Athens, which is mainly composed of British residents. They play games when sufficient members can be gathered together, and there are a few Greek nationals belonging to the club, most of whom have been educated in English schools. Matches are sometimes played when a ship from the British navy calls at the port of Phaleron and a game can be arranged with a team from the warships. Ice hockey is non-existent.

Golf.—There is only one golf course in Greece; it is situated at Aghios Kosmas (St. Kosmas), some few miles from Athens. The club was started by a number of American and British residents in Athens; it now numbers quite a few Greek nationals among its members. The course is, however, situated on low-lying ground close to the sea, and playing is often difficult. The equipment is all imported from Great Britain, prices being practically on the same level as similar equipment in England.

Tennis.—Tennis is rapidly coming into favour in this country, although it has still not reached the masses. This sport is handicapped by a lack of proper courts, and by the fact that during the summer months it is too hot during many hours of the day to play. There are two clubs in Greece: one in Athens and the other in Salonica. Some first-class courts are attached to the Athens club, the members of which are mainly foreign residents, with a certain number of better-class Greeks belonging to it. On these courts the matches for the Davis Cup European zone tournament are played when Greece has the choice of courts.

Tennis equipment comes mainly from England. Practically all the tennis balls imported into the country are of British manufacture, the three principal marks being "Dunlop," "Spalding," and "Slazenger." Tennis rackets are from England ("Slazenger" and "Spalding"), France, and Italy. It is among the tennis players that Canadian "Fleetfoot" shoes are mainly sold.

Badminton.—Badminton is not played in Greece.

Gymnastics.—At present there are no gymnastic clubs in the ordinary sense of the word in this country. Swedish exercises are taught in the schools and in military camps, but there are no gymnastic clubs with indoor apparatus such as parallel bars, horizontal bars, vaulting horses, etc. Indian club swinging is done to a small extent: a display was recently given by scholars from various schools throughout the country at a meeting in the Stadium at Athens. The display consisted chiefly of Swedish exercises *en masse*, with marching and counter marching.

Light Athletic and Field Events.—This branch of sport is becoming increasingly popular in Greece, and is more in keeping with the traditions of sport as practised in Ancient Greece. There are many clubs throughout the country, and keen interest is displayed at international meetings in the Stadium at Athens. Apart from the International Olympic games, a series of Balkan games is held each year at which athletes from Roumania, Jugoslavia, Bulgaria, and other Balkan countries compete. At the games held last autumn Greece headed the list of victors. It is now proposed to enlarge these games. Various equipment is in use. Throwing the disc is always popular. Discs are imported mainly from Finland, the success of Finnish sportsmen in this branch having an effect on sales, and Germany supplies a small number. Such discs are of long life and the demand is limited. Of the other equipment, vaulting hurdles can be made locally, running shoes are imported from Germany and a few from England, javelins are imported mainly from Finland with a few from Germany. Running shorts and vests are imported chiefly from Germany.

Fencing.—There is a school of fencing in Athens, mainly patronized by French and Italian residents and better-class Greeks. All the equipment is British.

Miscellaneous Products

WHISKY

Distilling is carried out on a fairly large scale in Greece. The products manufactured represent various kinds of liqueurs in imitation of foreign makes such as cherry brandy, curacao, crème de menthe, Benedictine, Chartreuse, etc. Pure alcohol is also distilled. The production of cognac, as well as that of *douzico* and *mastika*, which are typically Greek products, is fairly large. Exports of Greek liqueurs do not seem to be of any importance, as, although cheaper than the French brands, they are not much in favour, owing to their inferior quality. Greek cognacs are quite good and sell well abroad. Attempts have been made to imitate Scotch whisky, but without much success. While whisky is in some demand in this market, consumption is confined almost entirely to foreigners, and they will not drink the local imitation.

A number of brands of Scotch whisky are in the market. "Johnny Walker" and "Black and White," which sell at \$12.50 c.i.f. Piraeus, agent's commission included, are the principal ones. Annual imports of Scotch whisky amount to approximately 2,000 cases.

One brand of Canadian rye whisky is sold in this market to a small extent. Well liked for cocktails, Canadian whisky might find a larger sale in Greece if in the hands of energetic agents in both Athens and Salonica, the only two centres where whisky is sold. Attempts have been made to introduce other brands of Canadian whisky into this country, but without success. Advertising is essential in the introduction of new brands. One factor which militates against the development of a trade in Canadian whisky in Greece is its high price in comparison with Scotch, this being mainly due to the fact that the latter is entitled to most-favoured-nation or minimum rates, whilst the former is dutiable under the maximum rates.

Whisky is sold in bottles only and through commission agents. Commission ranges from 5 to 8 per cent. Cash against documents are the usual terms extended. Whisky is also shipped on consignment, and accounts are rendered monthly by agents.

RAW HIDES

The domestic industry is mainly confined to the tanning of sole leather. Upper sole leather is also tanned, but to a comparatively small extent. Raw hides and skins are produced locally in quite important quantities. Exports—which amount to between 3,000 and 4,000 metric tons per annum—are exclusively composed of sheep and goat skins. Imports, which comprise buffalo and cow hides, amounted in 1929 to 5,822 metric tons as against 4,520 tons in the preceding year. The principal sources of supply are, in order of importance, India, Argentina, China, France, Egypt, the United States, Italy, Algeria, and Italian Africa.

The hides which come from India are represented by dry salted buffalo and cow hides, in the following descriptions:—

Kind	Grade	Weight in Pounds
Cow hides.. . . .	Third, M.D.D.	25-30
	(Mixed Daccas dead)	30-35
Buffalo hides.. . . .	First, D.B.F.	30-35
	(Daccas buffalo first)	30-40

First and third grades dry salted, dry arsenic and wet salted cow hides are imported from Argentina: dry salted hides weighing from 30 to 35 pounds; dry arsenic hides, from 22 to 25 pounds; and wet salted hides, from 40 to 55 pounds. Prices vary widely according to brands and grades.

Chinese hides, which hold third place in the market, are gradually losing ground owing to the fact that they are sun dried. The hides originating in China (Hankow) are as follows:—

Kind	Grade	Weight in Pounds
Dry arsenic cow hides.. . . .	Best selected	22-25
Dry arsenic cow hides.. . . .	Seconds	20-25

Sales are effected through commission agents in Athens-Piraeus and Salonica, who send orders for account of the tanneries. To a small extent tanners import direct. Terms are generally cash against documents, but some exporters insist on an irrevocable credit being opened by the importer with a bank in London, Hamburg, or New York.

The market is at present overstocked, and it is estimated that a few months will elapse before import business can resume its activity.

FUR SKINS

Owing to the climate, the wearing of furs in Greece is fashion rather than necessity, and the demand is very limited. The kinds of fur skins required by this market depend largely upon the prevailing fashion, but in a general way it may be said that black fox, silver fox, red fox, fox cross, skunk, opossum, otter, and rabbit are in favour. As there is no means of curing skins in Greece, the demand is only for dressed skins, and as a rule of a rather inferior grade. All furs coming to this market are bought through London, Paris, or Leipzig, the three great European distributing centres, and it is reported that a certain quantity of furs obtained by Greek merchants in those centres originates in Canada. Furs shipped to Greece should reach this country at the very latest by the month of September. The Dominion's exporters of raw fur skins should consider the advisability of dealing direct with this market.

There is no breeding of fur-bearing animals in Greece. In Macedonia a variety of small skunk and some red foxes are to be found. These are trapped or shot by peasants. Furs produced in Greece are of a low grade, and as there is no curing done in the country they are shipped abroad, mostly to New York, in a raw state.

LEATHER

As has been stated above, sole leather and uppers are the only kinds produced in Greece, the former in quantities in excess of domestic requirements; but the latter must be supplemented by imports. Imports in 1929 amounted to 341 metric tons as compared with 320 metric tons in the preceding year, and consisted mainly of leather for the shoe industry. The principal sources of supply are France, the United States, Belgium, Germany, Great Britain, Italy, and Turkey. The largest share of box calf is sold by France, whilst that of patents and kids goes to the United States. The principal varieties in demand are box calf, kid, patent kid, patent calf, patent colt, *veau velouté* (suède), and patent cow sides in the following descriptions:—

Variety	Weight	Size
Box calf, boarded, black or coloured	H-HM	12-18 feet per hide
Box calf, smooth, light colours.	LM-L	6-10 feet per hide
Kid, black, light and dark brown	H-HM	4- 6 feet per hide
Patent kid, black	H-HM-M	3- 4 feet per hide
Patent colt, black	M-LM.	6-12 feet per $\frac{1}{2}$ hide
Patent cow sides, black	M-LM	8-12 and 12-18 per hide
Patent calf, black	LM-L	6- 8 feet per hide
Veau velouté, black and grey	LM	6- 8 feet per hide

Chrome tanned leather only is required in this market, and as far as quality goes, mixed, seconds, and thirds.

Import business is done through commission agents or direct with wholesalers in the three main centres of trade in Greece—Athens-Piraeus, Salonica, and Patras. United States firms usually demand cash against documents; European exporters grant credits up to four months.

In spite of their being dutiable under maximum rates, whereas leather originating in countries at present selling in Greece enjoy minimum rates, Canadian box calf and patents might be able to secure for themselves a small share of the trade.

LEATHER BELTING

The output of the domestic industry is rather small. Annual imports are placed at about 75 metric tons. Belgium is the chief source of supply, followed by Germany, France, and the United States. Leather belting for this market must be very flexible and vegetable tanned. Widths and thicknesses are variable. Exporters sell through agents in Athens. The trade being very limited, it would not be worth while appointing more than one agent for the whole of Greece.

LEATHER BOOTS AND SHOES

The domestic boot and shoe industry is highly developed and protected. The only imports, which are negligible, consist of high-grade shoes from Great Britain.

JUTE BAGS

Greek imports of new and second-hand jute bags amounted in 1929 to 1,951,193 kilograms, and in 1928 to 1,883,228 kilograms. The principal countries of origin with quantities in kilograms for 1929 are as follows, the figures for 1928 being given in parentheses: India, 760,899 (711,473); Great Britain, 276,574 (189,518); Czechoslovakia, 213,165 (79,492); Egypt, 183,779 (252,139); the United States, 178,216 (301,370); Italy, 169,519 (160,378); Netherlands, 81,708 (31,342); and Belgium, 24,224 (34,365).

The preference is for second-hand bags with a single red stripe, clean, and without holes. Specifications of these bags are: size, 28 by 48 inches; weight, 2 $\frac{1}{4}$ to 2 $\frac{1}{2}$ pounds; and texture, 8 by 8. Quotations for such bags are now placed at about \$16 per 100 c.i.f. Piraeus to agents or wholesalers.

Packing.—Jute bags are generally shipped in bales of 400 units, pressed, and bound together with steel bands.

Terms of Payment.—Cash against documents are the prevailing terms of payment in the jute bag trade.

Duty and Internal Taxes on New and Second-hand Jute Bags

• Tariff Item No. 209a	Maximum Minimum	
	Per 100 Kg. or 220 Lb.	
Duty	\$1 16	\$ 58
Plus 20 per cent.	23	12
	<hr/>	<hr/>
Internal taxes	\$1 39	\$ 70
	1 04	52
	<hr/>	<hr/>
Total in Canadian currency	\$2 43	\$1 22

INDUSTRIAL CHEMICALS

Greece has to rely on foreign markets for practically all her requirements of industrial chemicals. The principal source of supply is Germany, with France, Great Britain, Italy, and the United States sharing in the trade. Greek imports of industrial chemicals comprise a wide range of commodities, among which are acids of various kinds, alkali, chloride products, anhydrous ammonia, chloride of lime, carbonate of soda, chloride of ammonia, hypersulphite of soda, nitrate of soda, sulphate of ammonia, calcium phosphate, sulphate of copper, alum in crystals, caustic soda, carbonate of ammonia, chlorate of potash, oxalic acid in crystals, saltpetre, sulphate of soda, salamoniac, and all dyestuff intermediaries.

German chemical combines have their own representatives in the country, and have been established here a number of years. The other countries are dealing through commission agents.

ARTIFICIAL FERTILIZERS

The Athens office has received inquiries from various Greek firms wishing to represent Canadian exporters of mixed fertilizers, and the following notes have been prepared for the information of interested parties:—

Close on 70 per cent of the fertilizers now consumed in Greece are manufactured by the Société Anonyme Grecque de Produits et d'Engrais Chimiques, Athens, the yearly output of this concern aggregating 65,000 metric tons. Out of this annual production about 50,000 metric tons are sold locally, whilst the remaining 15,000 metric tons are exported to Cyprus, Egypt, and Turkey. The types of fertilizers produced in Greece are as follows:—

0	16	0	For completion of animal fertilizers
0	12	6	For trefoil and vegetables
4	12	3	For cereals
4	10	5	For currants, olives, fruit
4	10	10	For currants, olives and fruit
6	8	8	For potatoes, tobacco and flowers
7	7	3	For surface fertilizers, in lieu of pure nitrate

The first column of the above figures represents sulphate of ammonia; the second phosphoric acid; and the third, sulphate of potash. The mixture of these elements is made mechanically.

Except for sulphuric acid, which is manufactured in the country, sulphuric ore being available, the raw material used for the manufacture of fertilizers is supplied by Continental firms with which the Greek plants have recently concluded a five-year contract. Consequently no offers can be entertained from new sources before that time has elapsed.

DEPARTMENT OF TRADE AND COMMERCE, CANADA

Imports.—Domestic production is not sufficient to satisfy the country's needs, and some imports have to be made. The principal sources of supply are Belgium, France, Germany, the United States, the Netherlands, and Turkey, these countries having contributed in 1927 and 1928, according to the Greek official statistics, the following amounts:—

Country	1928	1927
	In Metric Tons	
Belgium	767	1,301
France	413	1,899
Germany	6,979	6,674
United States	2,950	2,762
Netherlands	547	630
Turkey	1,955	....
Other countries	1,495	547
Total in metric tons	15,106	13,813
Total value	\$779,653	\$736,707

While imports in 1928 reached the figure of 15,106 metric tons, the needs of the country would, however, call for much larger quantities, but owing to their weak buying power the rural classes have perforce to limit their purchases. When conditions are improved Greece will no doubt offer excellent opportunities for importations, a great development in domestic manufacture not being anticipated, and the home product being in any event of a much inferior grade. Canadian fertilizers are not being sold in Greece, but it is estimated that, if prices are right, they should be able to secure for themselves a fair share of the trade. As the Canadian product is not known to the trade in this country, interested concerns would be well advised to give, when quoting for this market, rock-bottom prices as an inducement for the farmers to buy and test it. Information as to prevailing prices for Greek and foreign fertilizers, together with the names of the firms mentioned above in the report, is on file at Ottawa and may be obtained on application to the Department of Trade and Commerce (quoting file No. T/C-10-184). Fertilizers needed in Greece are principally for cereals, trefoil, vegetables, tobacco, currants, olive trees, fruit trees, potatoes, and flowers.

The principal brands of fertilizers imported into Greece from abroad are the "Ammono-Phos" (American), "Guanowerke A.G." (German), "Auby" (French), "Key Brand" (German), and "Albatros" (Dutch). The "Ammono-Phos" fertilizers, owing to their quality, are the best received by the farmers in spite of their relatively high price. Their composition is as follows:—

13	48	0	For cereals and trees
20	20	0	For vineyards and vegetables
12	24	12	For tobacco and potatoes

The Guanowerke A.G. fertilizers are also popular, with their formulæ being the following:—

9	10	5	For cereals
10	8	6	For vineyards
9	9	8	For olive trees, tobacco, potatoes and other vegetables

Packing, etc.—Fertilizers shipped to this market from abroad are packed in strong bags of 50 kilograms (110 pounds).

Fertilizers are generally sold through commission agents. United States exporters' terms are the opening of an irrevocable credit in a New York bank. Some Continental firms, on the other hand, are satisfied with terms cash against documents, and others grant facilities up to ninety days, payment guaranteed by a bank.

For customs purposes, a certificate of origin issued by a chamber of commerce abroad and visæd by a Greek consul is required, together with a certificate of analysis by a licensed chemist in the country of origin.

Duty.—The duty on mixed artificial fertilizers is 1 metallic drachma (approximately 19.3 Canadian cents) per 100 kilograms (220 pounds) in the case of countries entitled to minimum rates of duty and 2 metallic drachmae (about 38.6 Canadian cents) per 100 kilograms (220 pounds) for other countries, Canada being one of these. American fertilizers are dutiable under the minimum rates. Internal taxes amount to about 75 per cent of the basic duty.

PHARMACEUTICAL CHEMICALS

All pharmaceutical chemicals needed in Greece are imported; they are as a rule received in a raw state and prepared by local chemists and druggists. Imports represent a wide range.

Patent Medicines.—Every kind of patent medicine is imported into this country from France, Germany, Italy, Great Britain, and the United States. Some Canadian brands are also to be found in the market, and interest is being developed towards the possible introduction of a wider range of Canadian patent medicines into this country. Patent medicines are usually shipped to Greece in bulk, these medicines being bottled, packed, and conditioned on the spot; such procedure permits an appreciable saving on customs dues. Advertising is an essential requisite in the patent medicine trade in Greece.

ABRASIVE WHEELS AND BLOCKS

There are important deposits of emery throughout the island of Naxos, but all the emery extracted from these deposits is shipped abroad in a raw state, with the result that such manufactured products as abrasive wheels and blocks have to be imported. The market for these commodities is limited, and there is keen competition from Italian, German, and Hungarian concerns. Some Canadian firms have been selling small quantities of abrasive wheels and blocks in this market, and although the quality offered is much superior to anything found in the trade, prices are too high to allow a successful business.

Specifications of abrasive wheels and blocks imported into Greece are on file at the Department of Trade and Commerce, Ottawa.

HARDWARE AND IRONMONGERY

As Greece is mainly a cheap market in hardware and ironmongery, and German manufacturers are well established with a variety of articles of a cheap nature, it will be difficult for Canada to enter the market. Apart from this, the Greek market is based on European tastes and many articles from Canada are not suited or are of too high a quality. The range of articles needed in this market is a wide one. Germany has the greater part of the trade, with Belgium, France, and Czechoslovakia supplying a certain amount. The English article cannot compete successfully as it is usually too expensive for the Greek market. The United States have also had no success, with the exception of a few specialties such as locks and keys.

Many articles are manufactured in the country on a small scale, including nails, bolts, rivets, keys of all kinds, buckets, stove piping, water cans, oil cans, and canisters for spices.

There are certain special lines, however, where Canada may be able to compete successfully; such lines are brass valves and fittings, and wire netting.

Tool Handles.—Practically the whole of the trade in tool handles is in the hands of local carpenters and joiners, the wood required being generally imported. German manufacturers supply a small quantity, but even with their low prices they cannot compete successfully with the local article, which is made by cheap labour.

Steam Valves.—The bulk of the trade in the Greek market for steam valves is at present in German hands. Before the war the American Walworth type of valve sold extensively in Greece, but after the war German manufacturers supplanted the American article with a light export pattern of valve, bearing no trade mark, and weighing about one-half the weight of the American valve. The quality is inferior, but the price is low, and as they are much lighter the import duty is less. Price is an important factor in the Greek market. Of such German-made valves the following sizes are most in demand: $\frac{1}{2}$, $\frac{3}{4}$, 1, $1\frac{1}{4}$, $1\frac{1}{2}$ and 2 inches; 10 to 12 atmospheric pressures.

Other articles in demand in the Greek market include check valves, gate valves, standard gate valves, and all-bronze foot valves.

Waterproof Cloth and Clothing.—Owing to the fairly dry climate of Greece, the demand for waterproof cloth and clothing is of no consequence. The prospects for an increase in sales are dependent on a wet winter, but last season was mild and sales decreased. England is the chief source of supply for waterproof clothing in the Greek market and takes about 70 per cent of the trade, Hungary, Germany, Czechoslovakia, and France sharing in the remaining portion of the trade. Imported clothing consists chiefly of mackintoshes for men, women, boys, and girls, with a small amount of waterproof clothing for motorists. The so-called trench coats, made of gabardine with a waterproof lining material, were popular last season. Waterproof cloth and clothing are not manufactured in Greece.

BATHROOM FIXTURES

Up to a few years ago baths were to be found in a very limited number in the houses of the better-class Greeks and in the so-called hotels-de-luxe of Athens. However, the use of this article is gradually developing, particularly in Athens and Salonica. There is no domestic manufacture. From an approximate figure of 10 in 1912, imports of bath tubs have passed to the comparatively high figure of 500 in 1929, fully nine-tenths of which were destined for the capital. Up to the present the water supply of Athens has been very poor. At one time water was obtainable only on certain days of the week, when it had to be drawn from taps in the streets. At present water may be had from taps in the houses, but only at certain hours of the day. The influx of refugees led to an acute crisis in the water supply, and steps were taken by the Government to have a reservoir and dam built at Marathon with a view to procuring a proper supply for Athens. These works are in the course of construction, and the contractors, the Ulen Company of New York, are of the opinion that they will be completed in the autumn of 1931, when the supply for both Athens and Piraeus will, it is estimated, be adequate. The increased water supply will undoubtedly lead to the wider use of bath tubs and bathroom fixtures generally in both hotels and houses. The demand at present is principally for enamelled bath tubs, porcelain washing basins without pedestal, and porcelain bath bidets.

Enamelled Bath Tub.—Bath tubs are imported principally from Germany. The sizes preferred are 1.70 to 1.80 metre in length, 46 to 48 centimetres in depth (inside measurements), and 75 centimetres in width (outside measurements). Such tubs are quoted at from approximately \$17 to \$18 c.i.f. Piraeus.

Porcelain Washing Basins without Pedestal.—These basins are imported mainly from Great Britain, Germany, and Czechoslovakia, the English product, although more expensive, being preferred. The sizes most in demand are (in inches) 16 by 20, 16 by 22, 18 by 25, and 19 by 27. Prices range from \$8.75 to \$15.79 f.o.b. Liverpool, for the best quality English basins, and discounts of 50 plus 25 plus 5 per cent are allowed. Washing basins with pedestals are not in demand.

Porcelain Bath Bidets.—Bath bidets sold in this market are mainly of British origin. These bidets come in the following sizes (in inches): (a) 15½ in height, 22½ in length, and 13½ in width; or (b) 16 in height, 26½ in length, and 15 in width. They are sold at from \$15 f.o.b. Liverpool, with export discount of 50 plus 25 plus 5 per cent. The metal parts are nickel-plated and sell at from \$3 f.o.b. Liverpool, with 5 per cent discount.

IRON AND STEEL PRODUCTS

Germany leads in the Greek import trade of iron and steel products, followed by France, Great Britain, and Belgium, each taking a fair share of the business, whilst imports from the United States are rather limited, as are those from Italy. Specifications of interest to Greek importers on such steel products as round, square and flat iron bars, angles, T iron, channels, iron beams, nail wire, barbed wire, flat galvanized iron plates, corrugated galvanized iron plates, etc., are on file at the Department of Trade and Commerce, Ottawa, and are available for interested Canadian firms.

IMPORTS OF METALS, METAL AND MINERAL PRODUCTS

Raw Iron, in sheets or in bars.—3,507 metric tons in 1929 as compared with 3,802 metric tons in 1928: Belgium, 1,314 metric tons (2,637 in 1928); Great Britain, 769 (252); France, 710 (175); Germany, 649 (505).

Unwrought Laminated Iron.—60,414 metric tons in 1929 (55,758 in 1928): Belgium, 40,065 (36,665); Germany, 9,624 (10,583); France, 8,432 (5,751).

Sheet Iron in General.—26,831 metric tons in 1929, compared with 21,264 in 1928: Great Britain 11,629 (9,260); Belgium, 11,298 (9,062); United States, 2,429 (1,304).

Articles of Sheet Iron.—1,271,432 kg. in 1929 and 1,313,887 in 1928: Germany, 366,831 kg. (484,270); United States, 185,324 (86,130); France, 112,542 (65,903); Belgium, 85,609 (21,146).

Iron Articles.—16,682,386 kg. in 1929 (18,660,336 kg. in 1928): France, 5,801,023 (814,491); Belgium, 2,803,683 (13,629,920); Germany, 2,271,956 (2,540,852); Great Britain, 2,026,724 (1,206,673).

Workmen's Tools.—1,085,155 kg. in 1929 (946,454 in 1928): Germany, 448,554 (361,866); France, 343,474 (361,821); Great Britain, 101,082 (70,902); Belgium, 45,443 (79,079).

Iron Pipes and Tubes.—10,996,301 kg. in 1929 (8,928,590 in 1928): France, 3,957,086 (1,125,675); Germany, 2,790,797 (2,030,955); Belgium, 2,475,699 (2,535,275); and Great Britain, 1,134,547 (2,139,260).

Chains in General.—306,794 kg. in 1929 (201,333 in 1928): France, 115,630 (85,999); Germany, 94,017 (58,862); Czechoslovakia, 38,431 (6,569); Great Britain, 11,826 (13,047).

Metal Wire and Ropes in General.—11,305,981 kg. in 1929 (10,696,801 in 1928): Germany, 3,832,828 (3,087,054); Belgium, 3,529,662 (3,136,193); Czechoslovakia, 1,114,664 (557,581); Austria, 827,634 (886,842); Great Britain, 824,898 (2,227,088).

Nails, Screws, etc.—2,221,023 kg. in 1929 (2,502,966 in 1928): Belgium, 825,095 (979,521); France, 457,759 (454,725); Germany, 268,898 (354,452); Sweden, 225,504 (231,198); Great Britain, 123,346 (223,717).

Locks, Padlocks, Keys.—326,627 kg. in 1929 (225,894 in 1928): Germany, 263,170 (181,216); Austria, 21,753 (23,404); Italy, 15,973 (2,001); Czechoslovakia, 11,921 (5,949).

Knives, Spoons, Forks.—243,855 kg. in 1929 (189,070 in 1928): Germany, 133,033 (119,272); France, 44,899 (27,524); Austria, 44,584 (29,671).

Cement.—75,935 metric tons in 1929 (70,798 in 1928): Russia, 24,009 (13,195); Jugoslavia, 23,109 (17,399); Belgium, 11,809 (6,081).

Asphalt and Bitumen in General.—4,839,908 kg. in 1929 (6,334,213 in 1928): Italy, 1,140,968 (1,352,078).

Coal.—785,441 metric tons in 1929 (695,395 in 1928): Great Britain, 525,518 (569,425); Russia, 155,469 (51,121); Turkey, 64,447 (35,170).

Weighing Scales.—63,573 kg. in 1929 (45,729 in 1928): Germany, 40,223 (34,054); Great Britain, 15,974 (3,743); United States, 1,129 (2,033).

ICE CHESTS

There is a good demand in the Greek market for the household type of ice chest for the preservation of food during hot weather. Germany, Austria, and Italy formerly supplied the market, but the local industry is now taking the larger share of the trade, both in the smaller and in the larger types. The chest which sells best in this market has the following specifications: length, 70 centimetres; breadth, 47 centimetres; height (without legs), 58 centimetres; ice capacity, approximately 15 pounds; water capacity, about 25 pounds. It possesses two brass taps (one for drinking water and the other to draw off the ice water) and is fitted with two zinc shelves. Ice chests of this type are made of cheap wood varnished and painted either brown or green. They are sold at approximately \$12 to \$19 retail according to size, and are gradually driving foreign makes from the market. They are zinc-lined throughout.

All ice chests for the Greek market should be fitted with a separate water tank to keep water cool during the hot months, without which sales are impossible. This is due to the poor water supply of the city of Athens, where drinking water is at present brought in from outside in stone jars, and even when the water supply is improved the hot summer climate will still make it essential. Delivery must be made in the winter months, and at all events not later than April.

GAS RANGES

Athens and Piraeus are the only two cities in Greece which possess a gas supply. The gas company in Athens was founded many years ago. At that time the supply was sufficient for the needs of the city, but, with the rapid increase in the population and the spread of the city, the company has not been able to keep pace with the new conditions. Not only is the supply inadequate, but it is also expensive. As a result, there is a very limited market for gas ranges, and these are sold by the company. Imports are from Germany and France, and sell at a low figure in comparison with the Canadian product. Until such time as the gas supply is cheaper and better, the type of range which will be in more general use in this country is—however strange it may seem—an American type of gasoline range, of which there are numbers at present in use. These ranges have from two to four burners and are fitted with a tank for storing the gasoline and are equipped with a pump.

ALUMINUM COOKING UTENSILS

There is a good demand in the Greek market for aluminum cooking utensils, but owing to the progress made by the local industry, imports are falling off considerably. Switzerland is the chief source of supply for imports, with Germany and France taking a comparatively small share of the trade. The demand is for a cheap article. Prices recently submitted by some Canadian firms proved to be much too high to compete in this market.

The usual thickness of imported and locally made aluminum cooking utensils is from $\frac{1}{32}$ to $\frac{1}{16}$ of an inch. The mat variety is preferred.

SILK HOSIERY

The extent of the demand for ladies' silk hosiery in Greece is estimated at 5,000 dozen pairs per annum for pure silk hosiery and 45,000 dozen pairs for artificial silk hosiery. France is the chief source of supply for silk hosiery, and Germany for artificial silk hose. There is only one factory which manufactures silk hosiery from Greek silk. The finish of the locally produced article is at present not up to that of the imported French quality, and the output and sale are still small.

Silk stockings in this market sell principally by the name of the brand. Publicity is made in the daily press and by window card display, and extensive advertising has to be undertaken to introduce a new brand. All business in the Greek market for silk and artificial silk hosiery is done through agents who take orders on behalf of stores and who work on a 3 per cent commission basis.

Quotations submitted recently by a Canadian firm were found to be much too high for this market, although the quality was well thought of.

SAFES AND VAULTS

The type of safe in use in the Greek market is the heavy non-movable type as supplied by English concerns such as Milner, Ratner, and Chubb. Some safes of German origin are also to be found in the market. English firms have been established with their agents in this field for many years, and although the initial cost of these heavy safes is high, they suit Greek clients owing to their solidity. Most of the large Greek banks have been fitted with English safes and vaults. The market for heavy safes in Greece is at the present time somewhat overstocked and business is quiet. The use of small portable safety cabinets for documents is not at present general. Several American types of such equipment are in the market, but sales are stated to be negligible. Modern equipment of this kind is not widely known at present, and the majority of Greek offices use the large heavy type of safe in which to place money and documents. Vaults are usually built to special requirements, and only when new banks or branches of banks are being erected.

There is a small local industry in the making of safes and safety deposit boxes, but its output is negligible.

SAFETY DEPOSIT BOXES

The use of safety deposit boxes has been introduced in this country a short time, and one or two of the banks now give clients this service. A French concern recently obtained an order for a number of safety deposit boxes for a local bank, and there are also German makes in the market. The demand is, however, limited and depends on any extension of banks. A local industry turns out safety deposit boxes on a small scale.

DUPLICATORS

There is practically no demand in the Greek market for the flat-bed type of duplicators, several Greek firms having already tried without success to introduce it. The type of duplicator which is required in this market is the rotary model similar to the "Roneo" or the "Gestetner," and for these there is a limited sale among the banks and larger offices. The market, however, is at present somewhat overstocked, and sales are dependent on the clearing up of the commercial situation. The "Gestetner" firm have a branch in Athens and employ travellers who make demonstrations throughout the country. Advertising is carried on by this firm on quite a large scale.

OFFICE EQUIPMENT

The Greek market for modern office equipment is at present stagnant. Most of the better-known American types of equipment are already in the market, but sales are strictly limited, and until the situation improves will remain so.

COAL

Annual imports of coal into Greece for the treble purpose of shipping, industry, and the manufacture of gas are placed at around 800,000 tons, but

this year, owing to quite a large number of vessels lying idle in the Greek ports on account of lack of freight, it is foreseen that imports will be reduced, and until the general situation improves there is little hope of an increase in the demand. Welsh steam and Durham coals are mostly in demand, about 60 per cent of the Greek imports coming from Great Britain, with Russia, Turkey, and Germany supplying the remainder. The sale of Nova Scotia coal to Greece is, owing to high freightage costs, quite uneconomical in normal conditions, and it is estimated that there is no chance of it entering the Greek market, except perhaps in the event of a coal strike occurring in Great Britain.

X

Customs Requirements and Regulations

The documents that may be demanded by Greek Customs, comprise: (1) Bill of Lading; (2) Certificate of Origin; (3) Sanitary Certificate; (4) Phyto-pathologic Certificate; (5) Certificate of Analysis; and (6) Import Permit.

The Greek Customs never require more than one document of each kind, and all forms are accepted providing they give the necessary information. Any language may be used in these documents, but for a language other than Greek an official translation into Greek may be demanded. As a rule, however, no translation is required when the documents are in French. No consular visa is necessary, except with certificate of origin, when same is issued, not in the country of origin, but at a point of transshipment. In all documents, abbreviations should be avoided.

BILL OF LADING

The ocean bill of lading only is required. Bills of lading must indicate:

(1) Date and place of shipment; (2) shipper's name and address; (3) consignee's name and address; (4) name of vessel and embarkation port; (5) accurate description of the goods with respect to—marks, quantities, class and contents of packages, weight, in metric or English units (gross weight; weight of inner packing, and weight of outer packing); (6) carriers' signature; (7) date and place of issuance of the bill of lading.

COMMERCIAL INVOICE

Goods subject to ad valorem duty (very few) are appraised by Customs officials and the duty is based upon such appraisement. Commercial invoices are not required, but they might serve a good purpose, as they may assist Customs officials.

Commercial invoices for Greece generally set forth the following:—

(1) Date and place of shipment; (2) shipper's name and address; (3) consignee's name and address; (4) name of steamer and embarkation port; (5) exact description of the goods in regard to—marks, quantities, class and contents of packages, weight, in metric or English units (gross weight, weight of inner packing, and weight of outer packing), value.

The value of goods may be stated in any currency, but the currency must be distinctly stated. The home market value need not be mentioned. The value may be f.o.b. or c.i.f. If c.i.f. is given it is advisable to indicate in separate items, costs of extra packing for export, insurance and freight.

CERTIFICATE OF ORIGIN

In order to secure the advantages of conventional rates, goods originating in countries entitled to most-favoured-nation treatment must be accompanied by a certificate of origin. The certificate of origin as required by Greek Customs constitutes a distinct document, and must contain the following clauses:—

(1) Date and place of shipment; (2) shipper's name and address; (3) consignee's name and address; (4) name of steamer and embarkation port; (5) precise description of the goods with respect to—marks, quantities, class and contents of packages, weight, in metric or

English units (gross weight, weight of inner packing, and weight of outer packing); (6) absolute specific declaration by the competent authorities that the goods are of—(indication of the country)—origin or manufacture, the competent authorities being Customs officials or Chambers of Commerce in the country of origin; (7) signature and stamp of official issuing the certificate; (8) date and place of issuance of the certificate.

As already stated, no consular visa is required, unless the certificate of origin is issued at point of transshipment. The certificate of origin must be produced within two months of the deposit of the manifest.

SANITARY CERTIFICATE

Sanitary certificates are needed in the case of imports of live animals and raw animal products.

PACKING LIST

This document is not obligatory, but it may prove of advantage when a shipment comprises several units.

CANADIAN GOODS SHIPPED VIA FOREIGN PORTS

There are no special requirements as regards invoicing Canadian goods shipped to Greece via American or other foreign ports.

MARKING

There are no regulations in Greece providing for the marking of goods entering Greece, nor have the trade description and the name of the country of origin, for customs purposes, to appear on the goods themselves, the immediate containers or outer packing.

PURE FOOD CERTIFICATE

Exports of foodstuffs to Greece need not be accompanied by a pure food certificate. However, foodstuffs are always subject to analysis by the State Laboratory. The use of chemical ingredients, designed for improving the appearance of foodstuffs or for any other purposes are absolutely prohibited. Moreover, according to various Government decrees, certain foodstuffs must fulfil given requirements as to nature of contents and limits of ingredients.

Patent Medicines.—Imports of patent medicines into Greece must be accompanied (a) by a certificate of analysis issued by a State laboratory in the country of origin, this document indicating quantity and nature of contents, place of manufacture, and name of manufacturer; and (b) by a certificate from the Medical Council, Medical faculties, or the Ministry of Hygiene showing that the sale of same is permitted in the country of origin. Both certificates must be authenticated by a Greek consul.

No certificates of analysis are required for ordinary drugs, but all drugs are subject to analysis by the Greek State Laboratory before sale is allowed.

PHYTO-PATHOLOGIC CERTIFICATE

Potatoes.—For the purpose of marketing potatoes shipped from abroad, Greece is divided into three parts, namely: (a) regions free from phylloxera; (b) regions suspected to be affected by phylloxera; and (c) regions affected by phylloxera. No certificate is required with shipments of potatoes designed for the Greek regions affected or suspected to be affected by phylloxera, and all countries are entitled to export this commodity to these regions.

Fresh Vegetables and Plants.—The regulations governing imports of fresh vegetables and plants are the same as for potatoes.

Apples.—There are no special regulations or restrictions with respect to imports of fresh apples.

IMPORT LICENCE

Greek importers require an import licence (issued by the Ministry of the Interior) for bringing ammunition and explosives into the country.

IMPORTATION BY THE STATE

The importation of all State monopoly goods—that is, cigarette paper, gasoline (Old Greece), matches, salt and playing cards, as well as that of opium and all narcotics—is effected only by the State.

PARCEL POST

No special regulations govern shipments of goods by parcel post to Greece. It is however, advisable to attach a commercial invoice to the ordinary postal documents.

TARIFF TREATMENT OF ADVERTISING MATTER

Printed advertising matter is admitted free of duty into Greece; if lithographed, it is subject to the tariff duty as imposed on all lithographed matter.

TARIFF TREATMENT OF SAMPLES

Samples of no commercial value are admitted duty free into Greece. Samples and specimens which are liable to import duty are temporarily admitted free of duty, subject to the amount of the import duties being deposited or security being given for payment if necessary, when imported by manufacturers or traders in Greece or brought in by commercial travellers. The marks which have been affixed by the Customs authorities in the country of origin on samples or specimens are considered as sufficient for identification purposes, provided that samples and specimens are accompanied by a descriptive list certified by these authorities. Additional marks may, however, be affixed to the samples by Greek Customs officials in all cases in which this additional guarantee is considered indispensable for ensuring identification on re-exportation. The period allowed for re-exportation is fixed at six months, subject to prolongation by the Customs authorities. When the period of grace has expired, duty is payable on samples which have not been re-exported, and the release of the security on those which have been is effected without delay. Formalities at Customs have not necessarily to be performed by the commercial traveller personally.

REGULATIONS REGARDING COMMERCIAL TRAVELLERS

Commercial travellers visiting Greece, except for an identity card, are not subject to any regulations, or taxes provided they act merely as bearers and receivers of orders. Commercial travellers' identity cards must be in accordance with the following specimen:

(NAME OF STATE)

(Issuing Office)

IDENTITY CARD FOR COMMERCIAL TRAVELLERS

(Valid for twelve months including the day of issue)

Good for.....No. of identity card.....
 It is hereby certified that the bearer of this card, M.....
 born at..... living at (Full address).....
 is a commercial traveller employed by Messrs..... (Full address)
 the proprietors of (kind of commercial establishment
 and nature of their business).

The bearer of this card intends to solicit orders in the above-mentioned country and to make purchases for the firm referred to. It is hereby certified that the said firm is authorized to carry out its business and trade at.....
and that it pays the taxes, provided by law, for that purpose.
, the19....

(Signature of the head of the firm)

Description of the bearer

Age	
Height	
Hair	Space
Special marks	for
(Signature of the bearer)	photo
.....	

No consular visa is required on commercial travellers' identity cards.

FOREIGN RESIDENT AGENTS

There are no special regulations with respect to foreign resident agents or representatives and branch houses. The treatment accorded natives is extended to them.

MINIMUM RATES APPLICABLE

All countries, irrespective of their having concluded or not a commercial agreement with Greece, are entitled to the minimum tariff rates on the following commodities:—Live animals (Item 1a -r), cereals (Item 7a -i), wheat flour (Item 8a), flour from other cereals (Item 8b 2); dried vegetables, such as beans, peas, etc. (Item 9a f); quinine and salts thereof (Item 161d), tanning extracts, generally of Argentina and Smyrna production (Item 175c 1 and 2).

ANTI-DUMPING LEGISLATION

The question is under study, but at present there is no anti-dumping legislation in Greece.

INTERNAL TAXES ON IMPORTS

A uniform charge of 75 per cent of the duty actually paid is made for internal taxes on all goods imported from abroad, except wine, carbide, explosive matters, tobacco, malt and alcohol, which are subject to special taxes.

GREEK ISLANDS

Customs regulations and requirements are for Greek islands the same as those applied to Continental Greece.

Conclusion

Greece is in a large measure tributary to foreign countries for wheat, provisions, manufactured goods of all kinds, industrial and agricultural machinery, metals, minerals, leather, paper, electric goods, pharmaceutical and industrial chemicals, rubber goods, and motor vehicles. General conditions, at the present time, cause Greek commerce to be stagnant in a number of lines, but it is estimated that a revival in trade will take place at no distant date. It is to be hoped that Canada will have her share in this trade revival, particularly as regards wheat, flour, provisions, and agricultural machinery. It is realized, however, that the absence of a trade agreement and lack of direct communica-

tions with Greece are serious hindrances to the development of Canada's general trade in this country. However, Greece is a market which deserves the attention of Canadian exporters, and should at any future time direct communications be established and most-favoured-nation tariff rates be extended to the Dominion, Canada's export trade to this country would make rapid strides.

Canadian concerns desiring to introduce their lines into the Greek market will receive all assistance from the Canadian Trade Commissioner's office in Athens.

LIST OF IMPORTERS

Lists of Greek importers have been filed with the Department of Trade and Commerce, Ottawa, and may be obtained on application.

ATHENS, August, 1930.

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